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Vicky Katsoni  
Anastasia Stratigea *Editors*

# Tourism and Culture in the Age of Innovation

Second International Conference  
IACuDiT, Athens 2015

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# Preface

The current book is the outcome of the effort of many people, who participated at the *2nd International Conference organized by the International Association of Cultural and Digital Tourism (IACuDiT)* in Athens, May 21–24, 2015 <http://iacudit.org/Conference2015/>. The theme of the Conference was on the ‘Forms and Norms of Tourism and Culture in the Age of Innovation’. The scope of the conference was to gather latest developments around several key themes, placing at the heart of the discussion the prominent goal of sustainable tourism, as a sector cross-cutting and interacting with cultural, environmental, economic, and social dimensions of our society. Towards this end, efforts were carried out for establishing a fruitful and challenging dialogue, understanding, and interaction among academic researchers and scholars, tourism industry professionals and key practitioners, as well as decision-makers, in order for knowledge and experiences to be creatively shared and synergies to be created. Athens, with its long history of democratic debate, was an ideal setting for this conference, and we really think that it provided a fitting opportunity for an open and productive discussion. In a globalized, digital era, nations seek to retain a sense of identity through their very unique cultures and history.

The Conference was chaired by the International Association of Cultural and Digital Tourism (IACuDiT) and co-chaired by University of Greenwich—UK, Linnaeus University—Sweden, and National Technical University of Athens (NTUA)—Greece.

The International Association of Cultural and Digital Tourism (IACuDiT) is a global network of people, projects, and events that bear on a wide range of issues of concern and interest in cultural and digital tourism, in an era of major global

changes. IACuDiT is a non-profit international association, which values creative, ethical, and progressive action, aimed at the improvement of global hospitality and tourism research on cultural and digital issues. IACuDiT brings together a wide range of academics and industry practitioners from cultural, heritage, communication, and innovational tourism backgrounds and interests. It mainly promotes and sponsors discussion, knowledge sharing, and close cooperation among scholars, researchers, policymakers, and tourism professionals. It is based on the notion that: 'Technological changes do not influence the missions of cultural tourism actors in the areas of promotion and product development, but rather the manner of carrying them out.' It provides its members with a timely, interactive, and international platform to meet, discuss, and debate cultural, heritage, and other tourism issues that will affect the future direction of hospitality and tourism research and practice in a digital and innovational era.

The valuable contributions to the 2nd IACuDiT Conference have formed the content of the current book. This is the amalgam of a variety of contributors, including academic researchers and scholars, industry professionals, and government/quasi-government officials and other key industry practitioners, who will share and highlight tourism industry trends and research gaps from a pragmatic and applied perspective.

On this occasion, we would feel obliged to express our sincere gratitude to the people and organizations for their contributions, help, and support for making the 2nd International Conference of IACuDiT a reality. We would also like to express our sincere appreciation to all our Keynote speakers who have enriched our discussion and questioning around key themes of the conference. In this respect, we would like to address our sincere thanks to *Zefi Dimadama*, Director General of the ICBSS (International Centre for Black Sea Studies); *Georgios Drakopoulos*, Special Advisor to the Secretary General of the United Nations World Tourism Organization and Counsellor in the European Economic and Social Committee; *Amitabh Upadhya* Professor—Dean Skyline University College, University City Sharjah; and *Hilary du Cros*, Honorary Senior Research Fellow, University of New Brunswick, Canada.

We would like to hope that this conference has added some value by sharing our knowledge and stepping a bit further interdisciplinary communication and understanding, issues that are forming the cornerstone for indulging in future tourist sector's developments.

We would also like to think that we have added some value to the intriguing and fascinating issue of tourism, although we always keep in mind its complexity and exposure to a range of unexpected and unpredictable factors (political, social,

economic, technological, environmental, etc.) that are shaping its future, a fact that was wonderfully expressed by John Steinbeck's words (Nobel Prize, 1962):

A journey is like marriage.

The certain way to be wrong is to think you control it.



Vicky Katsoni

Athens, Greece  
June 2015



Anastasia Stratigea





# Editorial

World Leaders meeting at two major summits, the United Nations Conference on Sustainable Development (Rio + 20) and the G20 Summit in Mexico, agreed that *tourism* can make an important contribution to many of the world's most pressing challenges, from economic growth to climate change, and recognized tourism as an economic powerhouse and contributor to all three pillars of sustainable development (economic, environmental, and social dimension). The above description is indicative of the role that tourist sector can play as a *key driver of growth* for the world economy, but also an important player for coping with current global challenges, taking into consideration the close interaction of the sector with the environmental and cultural resources of tourist destinations (Stratigea & Katsoni, 2015).

On the other hand, Chon and Olsen [9:213] state that '*... today's tourism environment is increasingly competitive and complex . . . and tourism organizations at the national, state and local levels must make estimates about the what is likely to happen in the future and decide how to adjust to future events*'. This statement implies a need to explore global challenges and threats of the external environment and structure future options for each single tourist destination that are adjustable to noticeable external signs (Stratigea & Katsoni, 2015).

The *key themes* emerging from the above statements, namely the potential of tourism as a key driver of growth, the strong competitiveness faced by the sector, and the emergence of new ICTs applications in tourism within a digitalized and highly connected and innovative environment, were explored in the context of the 2nd International Conference organized by the International Association of Cultural and Digital Tourism on 'Forms and Norms of Tourism and Cultural in the Age of Innovation'. The Conference goal was to get more insight into the various aspects of the above themes, by collecting different views, opinions, and practical experiences from different places of the world through the creation of an interdisciplinary platform of interaction among academia, policymakers, practitioners, tourism industry, etc.

The outcome of this trial is drawn on the present book of proceedings, which is the result of the effort carried out by a large number of people, contributing to the conference's study themes. This effort has cropped a collection of *45 contributions*, which, in the present volume, are classified into *four parts*. Each part elaborates on a specific *theme* of the Conference, in seeking to shed light on the different challenges faced by the tourist and hospitality sectors that are expected to affect the future directions of research and practice. Such challenges may refer to new tourist demand patterns, new forms of tourist products and development, and new policy directions, but also to new ICTs applications in tourism within a digitalized and highly connected and innovative environment.

The *four parts of the book* have as follows:

- Part I – ‘Cultural Tourism and Regional Development’
- Part II – ‘Emerging Forms of Tourism’
- Part III – ‘Methodologies, Tools and Approaches for Managing Tourist Destinations’
- Part IV – ‘ICT developments and Tourism—New Perspectives’

A short description (abstract) of the papers falling into each specific part of the book is given in the following.

## **Part I: Cultural Tourism and Regional Development**

The *first part* of the book consists of 12 *chapters*. The focus of this part is on exploring the link between cultural tourism and regional development of destinations, implying the sustainable exploitation of local cultural resources. Such resources have nowadays become highly appreciated assets of local destinations, which, based on the globally noticeable demand towards cultural tourism, become a value-adding attribute in the course of this tourism direction, with remarkable and promising implications for regional development.

In this respect, in chapter ‘Interdisciplinary Integration of Heritage Studies and Sustainable Development’, *Vesselin Loulanski and Tolina Loulanski* explore the importance of cultural heritage and sustainable development, attempting to shed light on the link connecting these concepts and the multitude of meanings and implications this link is carrying. The aim is to provide the theoretical rationale for upgrading and integrating their conceptual base by means of an interpretive synthesis. The latter builds upon identified common principles, goals, and new perspectives from relevant interdisciplinary fields. It is argued that disciplinary interactions and interdisciplinary approaches are fundamental in building the essential discipline-transcending terminologies, shared methodological grounds, and common analytical framework. The conceptual integration of cultural heritage and sustainable development is expected to equally support theory building and enhance the practical value of the existing fragmentary research for advancing the science of sustainability in both fields.

In chapter ‘Towards a Conceptual Model for Heritagepreneurship and Regional Development’, *Hans Lundberg, Marcela Ramirez-Pasillas, and Anders Högberg* present a conceptual model for discussing and analysing what happens when culture, in the form of heritage, and regional development, in the form of entrepreneurship, is juxtaposed, thus introducing the new concept of ‘*heritagepreneurship*’. By comparing case studies from Mexican and South West Scandinavian regions, this work aspires to elucidate potentials and limits in different ways of working with regional development, using heritage as a means. Case studies’ results showed that heritage becomes staged, enacted, and perceived in very differing ways, depending on the ways memories are embraced, constructed, or repressed in the ‘heritagepreneurship’ process. Different meanings thereby give different societal effects, influencing the ‘heritagepreneurship’ process.

In chapter ‘Cultural Product and Cultural Communication as a Dynamic Bipolar Interaction and Creative Contribution to the Structural Recompiled of the Local Cultural Units’, *Labros Sdrolias, Nikolaos Kakkos, Dagmar Škodová-Parmová, Ladislav Rolinek, Eva Cudlínová, George Aspridis, Zuzana Dvořáková-Líšková, and Vasiliki Kazantzi* elaborate on the necessity of destination managing bodies to restructure their policies for cultural tourist development, by elaborating on a more effective, sustainable, and challenging exploitation of cultural resources, at both the macro- (local environment) and the micro-level (tourist business). Such an approach was followed by the Municipal Cultural and Public Benefit Enterprise of Karditsa (DI.K.E.K)—Greece, by outlining its environment in order to identify weaknesses, and support an organizational redesign, which will ensure a more effective operation, a qualitative production of cultural products, and an upgraded communicative process, while sufficiently meeting cultural needs at the local level.

In chapter ‘Cultural Tourism Revisited: The case of Thessaly’, *Labros Vasiliadis, Panagiotis Trivellas, Dimitrios Belias, John Meleas, Dimitrios Kyriakou, and Athanasios Koustelios* stress the importance of cultural tourism as a promising direction of tourist development, allowing a qualitative shift from the mass, highly dominated by sun, sea, and sand tourist model of the Greek territory to more sustainable paths, in alignment with contemporary global tourist demand pattern. In this respect, they focus on a specific Greek region, the Region of Thessaly, in an effort to map available, yet unexploited, cultural resources and work out a strategic plan for the development and promotion of cultural tourism of this specific area.

In chapter “‘The Cultural Landscape of the Alentejo Pyrite’: What’s Next?”, *Marta Duarte Oliveira and Jorge Tavares Ribeiro* elaborate on the concept of cultural landscape, by focusing their attention on a specific Portuguese area, delineated as the Cultural Landscape of the Alentejo Pyrite. They stress the need for further elaboration of the cultural landscape concept, placing this into the broader territorial context it refers (evolutional, geographical, urban, architectural, heritage, etc.), in order to avoid fragmented and empty of meaning cultural landscape consideration. This will enrich the scope of planning interventions for integrating cultural landscapes in the regional/local development perspective.

In chapter ‘Sustainable Tourism. Mdina: A Situation Analysis of a Cultural Destination’, *Nadia Theuma, George Cassar, Sarah Faith Azzopardi, and Giuseppina Cardia* present a case study relating to the medieval walled town of Mdina—Malta. The aim of this study is twofold: first to identify the economic, social, cultural, and environmental impacts of tourist development in this specific city by means of a well-structured and documented manner, in an effort to pave the way towards more sustainable tourism development paths; and second to assess the penetration of ICT within Mdina’s cultural tourism attractions and the visitors’ perception of ICT on Mdina as a tourist destination.

In chapter ‘The Development of Tourism in Albania and the Importance of Cultural Tourism’, *Enkela Caca, Christos Ladias, and Antoneta Polo* elaborate on the current tourist policy of a Mediterranean country, Albania, a country with rich natural and cultural resources that has recently placed relevant attention on cultural tourism for regional development. The study explores the impact of this policy by working out statistical information, in an effort to sketch policy recommendations for a sustainable future of tourism as a key driver of the country’s future development perspective.

In chapter ‘Archaeological Rock Art Landscape of Northern Patagonia’, *Mag. Mónica Beatriz Gelós* sheds light on rock archaeological heritage and its exploitation, as part of the recently interesting variety of projects carried out in the region of Neuquén province, Patagonia, South America, in pursuing local development objectives and improvement of living conditions. The study elaborates on the sustainable exploitation of such a heritage, where the presence of a distinguishable number and variety of archaeological sites, with manifestations of rock art, is forming the basis for the establishment of the first archaeological park in the area.

In chapter ‘Museums – From Cabinets of Curiosity to Cultural Shopping Experiences’, the work of *Elizabeth Booth and Raymond Powell* provides an overview of the role and evolution of museums to date, prior to considering the development of role and function in one of the UK’s leading nationally funded museums, London’s National Gallery, the UK’s flagship visitor attractions and the second-best attended in the country. A content analysis of visitor provision was undertaken, while visitor profiling inferences were used for exploring how trading outlets and paid interpretation are currently influencing the museum product and its audiences.

In chapter ‘How Film Tourists Experience Destinations’, *Yuri Kork’s* work sets another dimension of marketing tourist destinations for regional development, the one of film portrays, as a means of influencing the decision of viewers to travel to a destination. In this work, the aim is to explore the underlying reasons of films’ power and stimulating effect on tourist decisions. Towards this end, an extensive survey was conducted, followed by a series of in-depth semi-structured interviews. Outcomes of this research—key attributes of films challenging tourist buy-in behaviour—can form the ground for a variety of tourist industry players, both private and public, for setting up their tourist marketing strategy.

In chapter ‘Citizen Perspectives on the Development of Local Cultural Resources: The Case of the Municipality of Serres’, a further enrichment of the scope of Part I is attempted by the work of *Ioannis Samoladas, Charalampos*

*Zilianakis, Katerina Lazaridou, Konstantina Papadopoulou, Eleni Tsolakiand, and Dafni-Maria Nerantzaki*, who stress the importance of taking into consideration local residents' perspective and view in cultural development planning. In studying this dimension, a survey was carried out in a specific Greek city, the city of Serres, located in the northern-western part of the Greek territory. The scope of the survey was twofold: first to explore to what extent residents of the city of Serres realize the importance of cultural assets and second to gain insight into what are the factors that inhibit local cultural development. Elaboration of these issues aimed at analysing the policy context and selecting effective policy measures for the sustainable exploitation of the abundant—yet insufficiently exploited—cultural resources, hosted by this specific Greek area.

In the last chapter of Part I, chapter 'Residents' Perceptions Toward Cultural, Social and Economic Benefits and Costs of Tourism Industry. An Empirical Survey', *Panagiotis Trivellas, Nikolaos Kakos, Labros Vasiliadis, and Dimitrios Belias* elaborate on the very important issue of community support in tourist destinations, which has been largely ignored in tourist destination studies, although reflecting a quite important pillar of sustainable tourism development, the social one. In this respect, they attempt to measure residents' perception as to the benefits of tourist development in the city of Chalkida, a capital city at a prefecture of Central Greece and capital of Evia Island, but also an already well-established tourist destination, mostly for internal tourism. A factor analysis of scaled items that were measuring residents' perception has resulted in eight tourism-related factors, while outcomes of the study reveal that residents' expectations from the current pattern of tourism development were largely not met.

## **Part II: Emerging Forms of Tourism**

The *second part* of the book consists of *nine chapters* and deals with new perspectives of sustainable tourist development, which are gradually gaining substance in a range of destinations at a global scale, permeating tourists' preferences and demand pattern. These perspectives present a new challenge for various destinations in their effort to take advantage of existing natural, cultural, and other types of resources as well as local expertise, available in their territory. Selected studies, presented in this respect, are focusing on medical tourism, rural and festivals tourism, Visiting Friends and Relatives (VFR) tourism, representing an important field of research in the light of current stagnation and economic crisis, and the Scuba diving tourism, reflecting an interesting perspective of sports tourism, in alignment with the blue policy perspective gaining ground in the European territory. The above emerging forms of tourism are considered as promising examples for fulfilling long-term, sustainable regional development perspectives.

More specifically, in chapter 'Multilingual Online Communication in Romanian Dental Practices' Websites and Their Application to Health Tourism', *Felicia Constantin and Androniki Kavoura* elaborate on the concept of dental tourism, as

part of the health tourism phenomenon, being the outcome of evolving globalization trends and enhanced mobility patterns. They examine dental tourism as a specific dimension of the tourist sector that has started to solidify in various countries, mainly due to price competition. Such a development implies that new communication patterns and practices need to be adopted for enhancing potential towards accessing clients and marketing the service. Their focus is on Romania, where content analysis was used to explore rated websites of dental practices of a cross-border region of Romania. Results reveal new cross-border marketing practices that, based on multilingual online communication, aim to support increasing visibility and thus cross-border market share of dental services in this specific region.

In chapter ‘Hospitality – Medical Tourism: The Civil Responsibility of Tourist Service Providers’, *Margere Rosa de Oliveira, Izabel Cristina Schander de Almeida, and Helena Charko Ribeiro* step further the discussion of the previous paper on medical tourism, by examining such a service as part of the hospitality sector, constituting an alternative to tourism seasonality. In this respect, they explore a range of issues that emerge by embedding medical services in the hospitality sector and target this newly emerging tourist market niche, while they attempt an in-depth analysis of regulatory, doctrinal, and legislative framework around this issue in Brazil.

Chapter ‘Domestic Medical Tourism: A New Look on Patients of the Public Health System and Their Companions’, by *Izabel Cristina Schander de Almeida, Helena Charko Ribeiro, and Eurico de Oliveira Santos*, examines another dimension of medical tourism, namely that of domestic medical tourism, as a source of income to relevant destinations. More specifically, they claim that further elaboration of this tourist sector dimension is necessary, for better grasping the benefits that can be reaped by destinations. They consider that this tourist clientele can offer certain potential, an inference that is documented by analysing this sector on the basis of an empirical study, carried out for 1 year (2014), in which data from public hospitals in Porto Alegre-RS-Brazil were gathered and analysed.

Chapter ‘Festivals for Local Products in Southern Bulgaria: The Perspective of Organizers’ elaborates further on the potential of local festivals as a tool for enhancing community integrity and promoting local culture. In this respect, *Ilinka Terziyska* explores the issue of local products-based festivals in the southern part of Bulgaria. The main goal of this work is to identify current problems and trends in this field from the point of view of organizers, focusing on issues, such as the expected benefits as perceived by organizers of these events, the structure of festivals in terms of participants and visitors, funding and advertising aspects, events’ organization, and authenticity of presented products. In this respect, key concerns were identified by organizers, mainly referring to the lack of public–private partnerships, relatively poor results achieved in terms of attracting tourists and promoting local business, difficulties in funding and advertising these events, as well as the low level of authenticity.

In chapter ‘The Quality Challenge in Rural Tourism’s Services: The Case of Madeira’s Country Homes’, *Elisabete Rodrigues* explores the issue of quality of

rural tourism services, by shedding light on a specific case study carried out in country homes in the island of Madeira, Portugal. This work aims at depicting the link between management capacities of the owners of country homes as tourism enterprises and the quality of services these provided. Towards this end, the study adopts a combination of qualitative and quantitative methods, such as the launch of questionnaire surveys, semi-structured interviews, field work, and bibliographical and documentary research. Results of this work can support decision-making for further enhancing the potential of country homes businesses to cope with increasing competition and demand for qualitative services.

Chapter ‘The Effect of VFR Tourism on Expatriates’ Knowledge About the Destination’ presents the work of *Chris Dutt, Ivan Ninov, and Dona Haas* on the, newly emerging but increasingly gaining popularity, concept of Visiting Friends and Relatives (VFR). This concept is largely underestimated and underreported in the literature, although strengthened by the increasing number of expatriates, a fact that stimulates VFR travel. Visiting Friends and Relatives (VFR) has become an increasingly popular research area with more consideration being given to this lucrative market. The study considered the impact VFR travellers had upon their expatriate hosts’ ability to learn about the destination in which they reside. Face-to-face interviews were conducted with expatriate residents in Dubai to uncover the VFR travellers’ impact on the expat-host from a learning standpoint. Results indicated that participants did learn about Dubai as a result of their visitor, largely due to an implied feeling of duty towards their visitor. As a result of this duty, expat-hosts learnt about tacit elements of Dubai, such as its history and culture, while also becoming more familiar with particular surface-level elements, such as hours of operation for shops and entrance fees for various types of entertainment.

In chapter ‘Mediterranean Nutrition and Hospitality: A Must for Greek Tourism Development? – The Case of the Region of Thessaly’, *Nikolaos Blanas, Ioannis Anyfantis, Ioanna Grigoriou, I. Koukoubliakos, M. Nousia, and John Meleas* elaborate on the issue of Mediterranean nutrition and hospitality as a comparative advantage for a sustainable tourist development of Greek regions, by focusing on the Region of Thessaly. In this respect, they aim to map, among others, the culinary tradition of this area, and more specifically the way that this is embedded in hotels and guesthouses’ policies for attracting visitors. By searching at the international experience on the topic, the authors conclude with a range of recommendations, which can improve competitiveness of the tourist sector in the specific region, by taking advantage of local gastronomy.

Finally, the last chapter of Part II, chapter ‘Challenges in Recreational SCUBA Diving in the Mediterranean Sea: Posidonia oceanica Meadows’, presents the work of *Georgios Skoufas, Anastasia Tsirika, Eleni Kalopesa, and Georgios Zalidis* as to the challenges posed for tourist development by means of recreational SCUBA diving activities in the Mediterranean, taking advantage of the value of *Posidonia Oceanica* as an attractive pole for such activities. A questionnaire survey carried out in diving resorts and clubs in the Sani region (Chalkidiki, North Aegean Sea, Greece) has revealed the low level of respondents’ knowledge on diving opportunities in *Posidonia oceanica* beds. The study elaborated on the potential of



Posidonia diving as a new challenging tourist development direction for the Mediterranean basin, with the most distinguished of them relating to the enhancement of the diving tourist industry and the conservation of natural resources.

### **Part III: Methodologies, Tools, and Approaches for Managing Tourist Destinations**

The *third part* of the book consists of *nine chapters*. Work presented in these chapters is mainly focusing on recent developments on methodologies, tools, and approaches for dealing with tourist development issues. The necessity of such tools is evident for supporting policy decisions at both the macro- (regions) and the micro-level (tourist businesses) in the tourist sector. This part is structured as follows: the first two papers exploit content analysis and quantitative research methods in exploring dark cities or battlefield tourism; the next two chapters deal with strategic planning approaches for coping with long-term tourist development objectives; next come two papers that use predicting methodologies and tools, relevant for the prediction of tourist demand in order to properly plan relative responses of tourist destinations; these are followed by one paper stressing the importance of human resources management as an effective tool at the business level for enhancing business competitiveness, followed by one more paper elaborating on the issue of tourist education; finally, the part concludes with one more paper that elaborates on a framework to assess the role of academic institutions, located in a region, in the sustainable development of this region.

More specifically, in chapter ‘Dark Cities? Developing a Methodology for Researching Dark Tourism in European Cities’, the work of *Raymond Powell and James Kennell* is presented, having at its heart the development of a methodological approach for researching dark tourism in European cities. More specifically, the aim of this work is to increase understanding of the relationship between dark tourism and urban tourism. It presents the initial findings of a research project that investigates the dark tourism products offered by European cities. A series of keywords were developed, following a review of the dark tourism literature, and this was used to carry out a content analysis of the Destination Marketing Organization websites for Europe’s ten most visited cities. The content analysis used Stone’s (2006) Dark Tourism Continuum to evaluate the dark tourism products offered in each destination and present a descriptive overview of Europe’s city-based dark tourism offer.

Chapter ‘Motivations in Battlefield Tourism: The Case of “1916 Easter Rising Rebellion”, Dublin’ constitutes a joint effort of *Jithendran Kokkranikal, Yeon Sun Yang, Raymond Powell, and Elizabeth Booth*, stepping further to the issue of dark tourism by exploring the motivations of visitors to major battlefield destinations and more specifically of those related to the ‘1916 Easter Rising Rebellion’. The

study employed quantitative research methods with a questionnaire survey at two different sites and a tour associated with Easter Rising rebellion in Dublin, Ireland.

Chapter ‘A Strategic Policy Scenario Analysis Framework for the Sustainable Tourist Development of Peripheral Small Island Areas’, by *Anastasia Stratigea and Vicky Katsoni*, presents a strategic policy scenario analysis framework that can be used for planning the sustainable tourist development of peripheral small island areas and its application and results in case of such an island, namely Lefkada—Greece. In this framework, the study makes use of foresight (scenario analysis) as well as participatory evaluation tools in order to explore long-term sustainable futures of tourist development in an environmentally sensitive, economically vulnerable, and socially unstable, of small-scale, peripheral island.

Chapter ‘Tourism Strategic and Marketing Planning and Cultural Cooperation Channels Between Greece and Turkey’, prepared by *Vicky Katsoni, Irfan Arikan, and Alev Diindar*, elaborates on the benefits reaped by neighbouring countries in terms of their tourist development by increasing collaboration and setting up strategic partnerships between governments and other strategic tourism principals. The study elaborates on such an example, taking into consideration a long-term strategic cooperation between Greece and Turkey, and stressing the importance of integrated planning and joint programmes for creating synergies and strengthening networks’ creation among tour operators. The paper also argues that developing a cooperation among EU and Turkey may lead to the use of the resources at maximum levels, creating a wider range of tourism products, and thus their members will be provided with significant capacity and responsibility to formulate a vision.

In chapter ‘Predicting Tourism Demand in the Western Greece Region Using Independent Component Analysis’, prepared by *Athanasios Koutras, Alkiviadis Panagopoulos, and Ioannis A. Nikas*, a tool for predicting tourist demand is presented, which is based on the use of Independent Component Analysis and is applied for this purpose in the Region of Western Greece. The proposed method uses Dynamic Embedding (DE) to transform the time series in a higher dimensional space, where Independent Component Analysis is performed to estimate the independent components (sources). Prediction is then applied using well-known forecasting techniques based on ARIMA models on each independent component, and the estimated ICs are transformed back into the data space to estimate the prediction. Experiments conducted using real data of tourism demand, showing the occupancy of all tourist accommodations (except from camping sites) of the Western Region of Greece, have proven the efficacy of the proposed forecasting method compared to well-known methods based on ARIMA models, for various prediction steps.

In chapter ‘Evaluating the Performance of Linear and Nonlinear Models in Forecasting Tourist Occupancy in the Region of Western Greece’, *Athanasios Koutras, Alkiviadis Panagopoulos, and Ioannis A. Nikas* evaluate the performance of linear and non-linear models as useful tools for forecasting tourist occupancy in the Region of Western Greece. More precisely, the problem of accurate tourism demand prediction is explored, using non-linear regression techniques based on

Artificial Neural Networks (ANN). The relative accuracy of the Multilayer Perceptron (MLP) and Support Vector regression (SVR) in tourist occupancy data is investigated and compared to simple Linear Regression (LR) models. The relative performance of the MLP and SVR models is also compared to each other. For this, the data collected for a period of 8 years (2005–2012) showing tourism occupancy of the hotels of the Western Region of Greece are used. Extensive experiments have shown that the SVM regressor with the RBF kernel (SVR-RBF) outperforms the other forecasting models when tested for a wide range of forecast horizons (1–24 months), presenting very small and stable prediction error compared to SVR-POLY, MLP, as well as the simple LR models.

In chapter ‘HRM Specificities’ on Portugal Hotel Units’, a joint work of *Susana Silva and Dora Martins* is presented, dealing with the role of Human Resources Management (HRM) function on Portuguese hotel units, as a tool for managing their staff. It is mainly based on qualitative case studies.

The data were collected through semi-structured interviews of 12 human resource managers from 12 hotel units located in Portugal. The results show that although there is not an effective HRM, current HRM practices are enough to encouraging pro-environmental behaviour in their staff and they have a direct effect on customer satisfaction and competitiveness of sector. However, managers recognize the need to introduce certain short-term changes for improving staff performance and increasing customers’ satisfaction as well as competitiveness of the hotel sector in Portugal. According to these results, the major theoretical and practical implications are discussed.

Chapter ‘Tourism Education in Greece: Development or Degradation?’ presents the work of *Dimitrios Belias, Dimitrios Kyriakou, Labros Vassiliadis, Athanasios Koustelios, Marina Bregkou, and Konstantinos Varsanis*, who are focusing on developments of tourist education in Greece, as a tool for supporting tourist development of the country. The purpose of this empirical study is to investigate tourism education changes over time and understand whether tourism education in Greece is currently undergoing a development or degradation phase. Factors like economic circumstances and technological developments are also assessed in terms of their role in the quality of the tourism education services offered.

Finally, chapter ‘The Influence of the T.E.I. of Thessaly in the Sustainable Development of the Region of Thessaly’, the last chapter of Part III, a joint effort of *George Vairaktarakis, Nikolaos Blanas, Theodosia Leventi, George Aspridis, and Labros Sdrolias*, elaborates on a framework to assess the role of academic institutions, located in a region, in the sustainable development of this region. In this respect, they focus on the role of the Technological Educational Institute (T.E.I.) of Thessaly in the economic, social, cultural, and educational development of this Region.

## Part IV: ICT Developments and Tourism—New Perspectives

Information is considered as the ‘lifeblood’ of processes in tourism, with the sector being largely an information- and communication-intensive sector. In fact generation, gathering, processing, application, and communication of information to businesses and customers are considered as day-to-day operations in travel and tourist industry. The pervasive role of ICTs and their applications in the sector has been largely acknowledged, driving win-win solutions and competitiveness, while it has also been extensively discussed by many researchers worldwide. This issue consists of the subject of the *fourth and last part* of the present book, in which 13 *chapters* are included. More specifically:

In chapter ‘A Stakeholder Perspective on Heritage Branding and Digital Communication’, *Adriaan De Man, and Cristiana Oliveira* explore the way museums perceive their current and future role in the digital communication era. They present museums as major stakeholders, anchoring a regional brand, around which SME tend to cluster, and thus assume responsibilities in constructing marketable identities. As such, the archaeological element becomes a very useful trademark. On the other hand, it also emerges erratically on the Internet, in personal blogs, commercial websites, and social networks. This forces museums to enter as a mediator, authenticating contents and providing credibility. What might be called the digital pull factor poses specific challenges to museum management, explored in this work, which relate to what is to be promoted, and how, in order to create and maintain a coherent presence in social media.

In chapter ‘Top European Museums on Twitter’, *Vasiliki Vrana, Kostas Zafropoulos, and Konstantinos Antoniadis* explore the use of Twitter by museums. The aim of this work is to record the top-60 European museums and their Twitter accounts. Eleven Twitter performance indexes are used to describe the activity and performance of these accounts. Descriptive statistics, Principal Components Analysis, and correlational analysis reveal that there is a significant differentiation among museums regarding Twitter performance. Performance of the accounts is described using the following principal components: networking, tweeting activity, time that the account is active, and involvement. A group of the more active museums on Twitter is constructed. Partially, Twitter performance is in accordance with museums popularity and ranking, while there are a significant proportion of museums which do not use Twitter. Implications and suggestions are provided for the museums to use Twitter as a marketing and promotion channel, especially for the museums which are placed lower within the ranking list.

Chapter ‘Social Media and Tourism: A Digital Investment for Thessaly?’, jointly created by *Dimitrios Kyriakou, Dimitrios Belias, Labros Vassiliadis, and Athanasios Koustelios*, attempts to study two hot and interconnected issues, namely social media and tourism, in a specific Greek region (Region of Thessaly). This effort aims to explore whether a digital investment concerning social media in the tourism sector would be applicable, suitable, and useful in this specific region. By

following a methodological approach, which explores tourist developments in both the country and the region at hand, the specific attributes of the study region, communication strategies adopted by the region towards boosting tourism potential, and current political, economical, social, and technological circumstances in Greece, the study concludes in a proposal as to the strategy needed, the possible barriers towards its accomplishment, and the topics that have to be further clarified, before action is undertaken.

In chapter ‘Assessing the Value of Hotel Online Reviews to Consumers’, *Dimitrios Paschaloudis, Eirini Koukidou, Apostolos Kottas, and Konstantina Saliaka* elaborate on the issue of online reviews about accommodation establishments. The aim of their work is to increase understanding of the value of accommodation online reviews, through a qualitative study. In this respect, a conceptual framework, based on consumer-perceived value theory, was developed and face-to-face interviews with accommodation online review readers were carried out. The results suggest that the value of reviews is primary epistemic and partially functional, while limited emotional and social value was reported. Furthermore, the elements eliciting the different value dimensions and additional variables affecting their value (such as information search patterns) were identified.

Chapter ‘A Cognitive Linguistic and Sentiment Analysis of Blogs: Monterosso 2011 Flooding’, a joint effort of *Raffaella Folgieri, Miriam Bait, and Jean Paul Medina Carrio* aims at exploring the use of web resources in order to trace the discursive strategies enacted to restore the image of a tourist destination and more specifically of the region of Monterosso, damaged by a flood in 2011. The innovative aspect of this work lays on its twofold approach, namely a linguistic approach within the framework of discourse analysis and a sentiment analysis approach, realized through tools available on the Internet and specific procedures developed in the R environment.

In chapter ‘Attitudes of MBA Students Towards Social Networking Sites for Online Travel Related Activities’, *Dimitrios Paschaloudis, Eirini Koukidou, Apostolos Kottas, and Konstantina Saliaka* explore the use of Social Networking Sites (SNS) by elaborating on the attitudes of MBA students towards SNS use for travel activities. The study takes into consideration four popular SNS, namely Facebook, Twitter, LinkedIn, and Google +. Fishbein model was used for the evaluation of students’ attitudes. The findings reveal that MBA students use SNS for getting socialized with other travellers and companies and informed about tourism destinations/companies/travel. Facebook remains the most popular Social Networking Site for travel activities, while for professional reasons (e.g. search for job in the tourism sector), LinkedIn rates first.

Chapter ‘The Significance of Electronic Word-of-Mouth (e-WOM) Content in the Shaping of the Visitor’s Perception of Quality and Value’, by *Simon Caruana and Claire Schembri*, explores the way use of electronic Word-of-Mouth Communication (e-WOM), i.e. User-Generated Content (UGC), can affect decision-making of readers in respect to hospitality industry. By exploring the principles governing users’ behaviour based on e-WOM through literature review, this work explores whether the same principles can be applied in the hospitality industry in

Malta, i.e. how readers use e-WOM to form pre-purchased expectations of quality and value in a hotel.

In Chapter ‘The Impact of New Emerging Technologies on Tourism Sector: Evidence from Lebanon’, *Andre Azouri, Ghada Salem, Ali Khreis, and Marwan Azouri* explore the way that Internet has been an indispensable tool for leisure or business trip planning. More specifically, they compare and analyse the impact of social media, emerging new technologies and e-tourism on sustainable tourism in Middle East, by taking as an example evidence from Lebanon. Key resources supporting inferences of this work are literature review, interviews and a focus group analysis held in the Lebanese University.

In chapter ‘ICT Applications and Web 2.0 Components for Tourism in Protected Areas’, *Vicky Katsoni, and Natali Dologlou* explore the contribution of ICT applications and Web 2.0 components for tourist development in protected areas. More specifically, this conceptual paper sets a first basis for future research work on ICT solutions for ecotourism in protected areas, in order to assist PA managers, local communities, and other ecotourism stakeholders to select the appropriate ICT tools, based on the particular developmental needs of the environmental, social, cultural, economic, technological, and political reality of their area.

In Chapter ‘Cultural Tourism Destinations and the Power of Virtual Reality’, *Spiros Polimeris and Christine Calfoglou* attempt to shed light on the potency of the digital medium and, more specifically, of virtual reality, by conducting a small-scale research, comparing the effects of diverse modes of presentation of the cultural tourism product on respondents’ choice of a cultural tourism destination. In other words, it explores the presentation mode as a motivation force underlying people’s statement of preferences. The powerfulness of this force is tested against variables such as the type of destination, destination popularity, and respondents’ cultural background. The power of the virtual is once more established and any correlation with the destination’s popularity, its ‘aura’, as well as with respondents’ cultural background is explored. The results are discussed in the light of virtual reality discourse as dominant, an instrument and a product of power, its non-linear organizational principles, and its affective dimensions. While these results can be made to inform cultural tourism programmes quite fruitfully, the question is posed whether the virtual may eventually override the in situ experience.

In chapter ‘Running on Heritage, a Conceptual Discussion on the Roles of Heritage Trails and of Augmented Reality on Amateur Runner Athletes’, *Despoina Gavrieli and Philippos Vakalakis* elaborate on a conceptual framework, targeting amateur athletes (runners) when participating in distance races (long runs) that are set in places of heritage significance. Moreover, they examine whether the amateur athlete’s experience is further enhanced through augmented reality. The introduction of augmented reality, i.e. location-based information delivered online, is expected to enhance human involvement and deliver a richer experience, by delivering related data to visitors in electronic form, during their visit. Finally, they question whether the information provided by augmented reality creates a link to the heritage-related ambience of the location, i.e. the heritage trail, in which case it may have an encouraging role in the amateur athlete’s endeavour to finish the

long run. Implementations, further considerations for research, and limitations are also discussed.

In chapter ‘Do TAM Constructs Predict E-tourism Adoption by Hotels in Agadir City South of Morocco?’, Rachid Oumlil and Yazid Ouhamane’s work aims at testing the ability of Technology Acceptance Model (TAM) to predict IT adoption by hotels in Morocco. The study was conducted at hotels located in Agadir City, South of Morocco. It expects to provide a useful knowledge on technology acceptance that could help policymakers to build more knowledgeable tourism IT strategies.

Last but not least, chapter ‘Identification of Instruments of the Development of Innovation of Tourism Enterprises’, by *Leszek Koziol, Radoslaw Pyrek, and Anna Wojtowicz*, aims at the evaluation of innovative capacity of tourist businesses, by presenting the results of empirical research on innovation of 12 tourist enterprises. Key determinants of innovative capability, as defined by the outcome of this study, are quality of labour and managerial competence in innovation, but also knowledge exchange by use of IT tools.

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**Part I**  
**Cultural Tourism and Regional**  
**Development**

# Interdisciplinary Integration of Heritage Studies and Sustainable Development

Vesselin Loulanski and Tolina Loulanski

**Abstract** The link between cultural heritage and sustainable development is one of major importance and carries a multitude of meanings and implications for both parties. Cultural heritage is all-the-more inherently related if not embedded within the process of development. Both concepts are evolving within a social context, and can be characterized by dynamism, complexity and multiplicity in terms of values, definitions, dimensions, functions and scales. What is the actual relationship between them and how these can be drawn together in a common methodological framework, given the lack of comprehensive and systematic interdisciplinary knowledge linking the two so far independent notions? This paper aims to provide the theoretical rationale for upgrading and integrating their conceptual base by means of an interpretive synthesis. The latter builds upon identified common principles, goals, and new perspectives from relevant interdisciplinary fields. The paper argues that disciplinary interactions and interdisciplinary approaches are fundamental in building the essential discipline-transcending terminologies, shared methodological grounds, and common analytical framework. The conceptual integration of cultural heritage and sustainable development is expected to equally support theory-building and enhance the practical value of the existing fragmentary research for advancing the science of sustainability in both fields.

**Keywords** Cultural heritage • Sustainable development • Interdisciplinary integration • Meta-synthesis

**JEL Classification** L83 • Q01 • Z10 • Z18

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## 1 Introduction

Cultural heritage includes the material aspects of culture—sites, buildings, landscapes, monuments, and objects—as well as the non-material aspects, which are embodied in social practices, community life, values, beliefs and expressive forms such as language, arts, handicrafts, music and dance. In the field of heritage, multiplying recent initiatives indicate of the essential need and general trend of linking and integrating cultural heritage within sustainable development. The Fourth Conference of European Ministers responsible for cultural heritage adopted a declaration that called for the establishment of a European methodology for heritage management in the framework of sustainable development (Council of Europe, 2001). Similarly, in 1994 UNESCO launched the MOST Program (“Management of Social Transformations”) as part of its Social and Human Sciences Sector, aiming to foster and promote relevant and reliable social science research. Its focus is placed on building efficient bridges between research, policy and practice, for the promotion of a culture of evidence-based policy-making, nationally, regionally and internationally. Among the key themes and of particular significance for our research subject are the projects on “Urban Sustainability” and “Social Sustainability in Historical Districts”. Two other corresponding initiatives of the European Commission, involving research communities from European universities, are the SUIT Program (“Sustainable Development of Urban Historical Areas through an Active Integration within Towns”), implemented between 2001 and 2004, under the 5th Framework Program for Research, named “The City of Tomorrow and Cultural Heritage”. The other is “Urban Sustainability and Cultural Heritage”, which is a thematic priority under the 6th Framework Program for Research, named “The Global Change and Ecosystems Part of the Sustainable Development”, running from 2002 to 2006.

However, despite these policy-centered developments, we find no equally motivated noteworthy attempts to study the integration of both in the academic literature. In our view, the lack of progress can be partly blamed upon the continuing absence of research into a feasible mechanics of integration on a conceptual level. Altogether, “cultural heritage in sustainable development” remains a very new theme, vastly unexplored in both theoretical and practical terms. Although it tends to look like a solid, trustworthy and multipurpose formula for both subjects, still, to a large extent it lacks the clarity and specificity to become a working formula as well. Even though the theme has attracted the attention of scholars from many disciplines and fields, the research of the suggested relationship is still in its infancy, in need of both theoretical strength and wider empiric support. In particular, there is insufficient multidisciplinary research that takes a holistic and integrative view, and studies their relationship in a systematic way. In this sense, the problem of unveiling and explaining the relationship in question is considered a problem worth-pursuing, which is of fundamental importance not only for heritage, but also for society as a whole.

Structurally, after describing the problem of the lacking common theoretical-analytical ground between the disciplines of heritage and sustainable development, the article provides evidence (in the form of interpretive synthesis) of some possible lines of conceptual convergence. The latter involves outlining the major cross-disciplinary fields that deal with the two concepts in a holistic manner, and how they contribute to studying the integration of both. Next, some shared goals and principles embedded in both concepts are identified. Finally, the article puts forward a new methodological approach that could support integrated research and bring together the two so-far independent concepts into a viable framework for the analysis and integration of cultural heritage in sustainable development, taking into account the complex interactions between their diverse dimensions.

## 2 Literature Review

The history of heritage as a subject of research perceived in its complexity and totality is not long. Different disciplines in the social and human sciences have explored heritage in a rather fragmented or heavily thematic way, through their specific lens and methodologies, preoccupied with preserving and even reinforcing their disciplinary distinctions. History and archaeology, geography, cultural studies, anthropology, art and architectural history, museology and conservation studies, sociology, philosophy, politics, psychology, linguistics, semiotics and others have addressed the issue of heritage in their own way, prioritizing its scientific value above all others. These traditional cognate disciplines to heritage have studied (and to some extent still do) just the “raw materials of heritage” (Ashworth & Howard, 1999, p. 26), focusing largely on the physical side of heritage, ignoring its multiple potential and meanings in contemporary society. However, the growing number of heritage-interested groups has brought a growing number of viewpoints, opinions, definitions and attitudes to heritage that has further complicated its concept and field of study, and increased the number of relevant issues to be dealt with both in theory and practice. The expert-led practice in heritage has significantly changed, with academics recognized as but one of the many heritage stakeholders (i.e. local communities, owners, governments, business entities and developers, tourists) involved in it (Ashworth & Howard, 1999), albeit one with a still very significant contribution to make in the overall process, especially through collaborative efforts. The heritage perspective has been updated and now openly articulates a discipline-transcending approach. This new reality has necessitated the birth of Heritage studies, an interdisciplinary field exploring the impact of heritage on the present and the development of new holistic approaches to address the complexities and challenges related to heritage. Analogous to the Conservation field, Heritage studies can be characterized as a “loose amalgam involving the social sciences, the humanities, the hard sciences, and public policy” (See Avrami et al., 2000, p. 10). Representative of many contemporary definitions, cultural heritage is most often defined as “the contemporary purposes of the past” or “that

part of the past which we select in the present for contemporary purposes, be they economic, cultural, political, or social” (Graham, Ashworth, & Tunbridge, 2000, pp. 2, 157). Heritage is further described as an evolutionary notion of a multi-faceted construct, with dynamism, complexity and multiplicity as its primary features, which is inevitably rooted in the present and evolving (Loulanski, 2006). It is increasingly perceived to be more about interaction with the past than preservation of the past; more about people of the present as creators and benefactors of heritage, who attribute value and functions, and select what is to become heritage from the infinity of the past. Nevertheless, though significant interdisciplinary research has already appeared, the new field has not yet provided the required sound conceptualization of heritage, tolerant of its modern perceptions, less controversial and effective to work with. For this purpose, Heritage studies need to further broaden and strengthen their theoretical core, opening up for new fundamental conceptual inputs, interdisciplinary collaboration and cross-fertilization of ideas; only then stronger disciplinary presence and “agreed framework of reference and research”, considered a problem of critical importance in the field could be gradually elaborated (Pearce, 1998, p. 1).

The concept of development has been similarly redefined to stand for improvement rather than the traditional growth (defined solely by narrow economic indicators), and is viewed now more as qualitative improvement including social, economic, and ecological measures (Kumar, Manning, & Murck, 1993). The classical definition of sustainable development coins it as the ability of humanity to ensure that it meets the needs of the present, without compromising the ability of future generations to meet their needs, and more specifically “a process of change in which the exploitation of resources, the direction of investments, the orientation of technological development, and institutional change are all in harmony and enhance both current and future potential to meet human needs and aspirations” (The Brundtland Report, WCED, 1987, p. 46). Put more concisely, sustainable development is a holistic concept that represents a broad framework linking social, cultural, economic and environmental elements, aiming at the simultaneous achievement of multiple objectives in a balanced way. Further in the text, we shall limit our perspective to accounting only for the academic version of the concept in its broad contextual meaning (see Mitlin, 1992; Osorio, Lobato, and Del Castillo (2005); Pearce, Markandya, & Barbier, 1989; Pezzey, 1989; 1992; Rees, 1989) for comprehensive reviews on definitions and interpretations; Adams (1990), Lele (1991), Jacob (1994, 1996), and McNeil (2000) for critical reviews of the concept; Mebratu (1998) for the different discourses: institutional, ideological and academic). Sustainable development, will be interpreted not as an “autonomous development per se, aimed at preserving nature for the mere purpose of sustaining development” but as “societal and economic development, pursued while sustaining the integrity of the planet” (Miyamoto, 2000, p. 14). It will also imply “not irreversibly damaging” the natural or the cultural environment (McNeil, 2000, p. 12), “sustaining [equally] the natural [and socio-cultural] life-support systems on Earth, and extending to all the opportunity to satisfy their aspirations for a better life” (Hediger, 2000, p. 481). Because, it is widely acknowledged that even without



one ‘ideal definition’, the concept of sustainable development can provide an excellent anchor and context for analysis of diverse and wider issues (McNeil, 2000, p. 10; Rodwell, 2003).

The disciplinary profile of the concept can be originally attributed to the natural sciences that first brought it to light, and were predominantly concerned with the natural/environmental dimension of sustainable development, calling for sustaining the biosphere and more precisely coping with global change, conserving biodiversity, and maintaining sustainable ecosystems (Clark and Munn, 1986; Lele & Norgaard, 1996, p. 357; Ludwig, Hilborn, & Walters, 1993). Later, substantial contributions were made by economics, ecology, sociology, and development studies, however they all maintained strong disciplinary differences, trying to offer solutions to separate problems (e.g. natural resource management, poverty reduction, increasing growth) in a piecemeal manner, and failed to recognize the impact of positively charged and integrative concepts (Serageldin, 1996). This has led sustainable development to suffer a lot of problems in its earlier conceptual development: lack of coherence, diversity of vocabulary and meanings, lack of systemic knowledge, different competing interests and discourses, focus on the ecological dimension at the expense of the neglected or poorly addressed “softer and more fuzzy” dimensions such as social, cultural and all others (Brandon & Lombardi, 2005, pp. 74–75). Consequently, for the most of its part the previous research on sustainable development has resulted in a heavily fragmentary knowledge base that failed to capture and work toward the true meaning and very essence of the concept, that is reaching a balance and co-existence among all three systems (nature, society and economy), and dealing with the interdependence among them. It failed to consider the integrative character of its objectives: economic (growth, equity, efficiency); social (empowerment, participation, social mobility, social cohesion, institutional development) and ecological (ecosystem integrity, carrying capacity, biodiversity, global issues) (Serageldin, 1996), and ultimately, it also failed to provide a link between research and practice.

The above overview illustrates that the academic accounts of cultural heritage and sustainable development have developed in isolation from each other, showing prevailing mono-disciplinary, theory-bound and reductionist characters. Far more typical was a tendency towards divergence rather than convergence between both and that seriously impeded the process of establishing dialogue and unlocking their potential in theory building and practice. But that was before, now the two fields undergo a critical re-examination stage so as to open up to innovative and wide-ranging sustainable approaches. However, this stage will require conceptual frameworks that overcome the shortcomings of the past “development without culture” or “society without nature” conceptualizations, and shift the guiding reference to the interconnectedness between the systems (Becker, Jahn, Stiess, & Wehling, 1997). Nonetheless, despite its ambiguity and earlier faults, sustainable development is still the first overarching concept based on an unprecedentedly wide semantic platform, which in contrast to its predecessors and rivals, is far more holistic and constructive. In rejecting a single, clear-cut definition, it proves able to accommodate for a variety of meanings, dimensions and frameworks, in a variety of contexts,

globally and locally, allowing to be continually upgraded and revised. It has become more pluralistic and culture specific being more frequently defined at the grass-root level, respecting local knowledge and heritage, and is by no means a “universal prescription” (Ellen, 2000, p. 162). Its appeal in both conceptual and practical terms is that it is “intensely synthetic”, incorporating not only different aspects and ideas about development but accounting for critical views as well (Adams, 1990, p. 66). In this sense, it can be expected that the concept would only benefit if its theoretical frame is further expanded and integrated within a more cohesive interdisciplinary body of knowledge, so as to accommodate for previously neglected factors and components, as is the case with cultural heritage.

Next, we will demonstrate that this process is actually underway because as inevitably the two concepts evolve, they intertwine and move into a common interdisciplinary territory. Even though, a perfectly valid “grand synthesis” that fully integrates the knowledge base of heritage and that of sustainable development cannot be easily accomplished, especially considering the long going wide gaps between and within the natural and social sciences, we shall argue that disciplinary interaction and interdisciplinary approaches are the key to building the necessary discipline-transcending terminologies and methodological grounds for the elaboration of a common framework for analysis of their multifaceted relationship.

### 3 Methodology

More than a decade ago, in his seminal book “Consilience: The Unity of Knowledge” (1998), Wilson pointed out that the existing detrimental divide between the branches of learning has resulted in major errors in interpretation in-between fields, and persistent “confusion”, with “no maps. . . few concepts and words [that] serve to guide us” (ibid, p. 9). Nonetheless, the present-day challenge of sustainability, critical for both heritage and development, requires a “new age of synthesis”, when the intellectual challenge of *consilience* (literally “bringing together” of knowledge; more articulately defined as “units and processes of a discipline that conform with solidly verified knowledge in other disciplines, and are superior in theory and practice to units and processes that do not conform”) is pursued and disciplinary boundaries are replaced by “shifting hybrid domains in which consilience is implicit” (ibid, pp. 198, 10). These domains promise to reach across many levels of complexity, enriching the spectrum of research perspectives, generating ideas, acknowledging and accounting for claims from varied sources. McNeil (1999) attributes a comparative advantage to hybrid science and interdisciplinary research before the traditional ‘hard’ and ‘pure’ disciplinary stances for two reasons. The first is instrumental, since they have higher practical value than mono-disciplinary research, and the second is intrinsic, since the most interesting and path-breaking work is commonly to be found at the interface between disciplines. According to him, the ‘soft’ and ‘hybrid’ disciplines are more recursive and reiterative, applying diverse criteria, seeking synthesis before analysis, more qualitative than

quantitative, and recognizing inevitable value bias and the primacy of problems to the primacy of methods.

The review of the literature reveals that fragmentation of knowledge is a problem in the study of both cultural heritage and sustainable development, with a proliferation of isolated studies that neither converge into theory nor significantly assist practice. To solve this problem, we suggest a new methodological approach, that of meta-synthesis (synthesizing qualitative research in the evidence base), and particularly meta-ethnography (Noblit & Hare, 1988) where the above idea of consilience finds a solid support. The methodology is considered particularly efficient to broaden the research perspectives by translating and integrating interdisciplinary insight from across social and natural sciences. Originally, meta-ethnography was developed as a method to “put together” the many different studies in the field of ethnography, accounting for cultural differences. It seeks a “synthesis of knowledge”, which is inductive and interpretative and at the same time with a holistic orientation, relating different disciplines and elements together instead of referring them to a general classification imposed from outside. The purpose is not to generate predictive theories, but to facilitate a fuller understanding of the phenomenon, subject or context under consideration (Jensen & Allen, 1996; Sandelowski, 1993). While preserving the integrity and holism of individual studies, the method prioritizes interpretation rather than aggregation, applying various inductive and interpretive techniques to sufficiently summarize the findings of individual studies into a product of practical value (Jensen & Allen, 1996; Noblit & Hare, 1988; Sandelowski, 1993; Sandelowski, Docherty, & Emden, 1997). It should be highlighted that even though meta-ethnography requires that adequate analogies are created among studies, the successful synthesis does not require these analogies to be direct or complete (Noblit & Hare, 1988, p. 75). They must be audience-appropriate, enabling different audiences from different fields to compare their perspectives with those revealed in the studies and the synthesis. The ultimate goal of meta-ethnography as a method is to facilitate the dialogue between perspectives and “not to achieve closure, but to enable disclosure” (ibid, p. 77). This philosophy can be considered particularly meaningful in terms of advancing the “science of sustainability” in both heritage and development terms, by conveying the notion of multiple sciences addressing a common theme, with a problem-driven research agenda, seeking to create and apply knowledge to support decision-making for sustainable development (Clark & Dickson, 2003). To give just two examples of the multiplying efforts in this direction, we can refer to Munasinghe (2002) who has developed the innovative comprehensive and eclectic sustainomics approach, described as a transdisciplinary, integrative, balanced, heuristic and practical meta-framework to define, analyze and implement sustainable development. Similarly, Loulanski and Loulanski (2011) employ the meta-synthesis approach in their cross-disciplinary investigation of the relationship between cultural heritage and tourism. The study systematizes evidence on concepts, policies and strategies and provides an interpretive synthesis illuminating the critical factors for the sustainable integration of heritage and tourism. This new approach is expected to contribute to theory-building in the Heritage studies field, supporting current efforts to develop

greater cohesion and connectedness by providing conceptual or theoretical overviews for modelling the interplay of economic, cultural, political, and other social contexts in which it is situated.

## 4 Results: Interdisciplinary Integration

### 4.1 Core Interdisciplinary Accounts

As both cultural heritage and sustainable development concepts are studied by different disciplines, there are multiple perspectives, methodologies and tools that enter various interactions. More or less all these relevant contemporary disciplines can be assigned to the group of the “soft” and “hybrid” sciences of interdisciplinary character, which just recently have begun to recognize each other’s existence, combine each other’s analytical strengths, and seek an agreed “middle ground” and “interfaces” to work on equal terms. An approach which albeit is absolutely necessary, provided that today’s “hybrid realities” and “hybrid status of entities” (Latour, 1993) certainly need a valid “hybrid knowledge base” allowing for integration, and first of all on a conceptual level.

Table 1 offers an *interpretive synthesis* (Noblit & Hare, 1988) of the major interdisciplinary fields dealing with the concepts, outlining each field’s scope, its relevance to the issue of their conceptual integration, and some key contributors.

Despite the expected interconnectedness in regard to the scope and focus of study among the above fields, none of them is in a position to claim a singular role in its capacity to address such a complex issue as the conceptual integration between heritage and sustainable development. And quite understandably so, as the subject of that integration is elaborately constructed from social, cultural, environmental, economic and physical viewpoints. What is also beyond doubt is that each field’s contribution to the theme can significantly add to the pool of elements necessary to build the common theoretical framework. Even though a number of integrative theories have recently spawned from the fields above, consistent interdisciplinary efforts aimed at advancing the mechanics of such integration are still missing. The outcomes remain rather distant and too specific, resembling the pieces of a puzzle, but failing to pull together the bigger picture of heritage within sustainable development.

### 4.2 Shared Principles

At this point, we will use the synthesis above to outline several important cross-points or principles that illustrate not only the two concepts’ natural embeddedness, but also promise to guide the process of *gluing* their many different components into the construction of a valid integrative conceptual base.

**Table 1** Interdisciplinary fields studying cultural heritage and sustainable development

Inter-disciplinary fields	Scope and focus	Relevance to the conceptual integration	Key contributors
Heritage studies	Applied field that studies the impact of heritage on the present, and vice versa.	Recognizes the wide values-based diversity of heritage and the complexity of its construct, aimed at achieving balance between the interests of the different heritage stakeholders. Places priority on the developmental potential of heritage, its various uses and the sustainability of heritage resources.	Lowenthal (1985, 1998), Fowler (1992), Tunbridge and Ashworth (1996), Herbert (1997), Pearce (1998; 2000), Ashworth and Howard (1999), Graham (1998, 2002), Cassar (2003), Cassar and Drdacky (2002), Galla (1995, 2002, 2004), Howard (2003), Hoffman (2006), Graham and Howard (2008).
Cultural economics	Explores the relationship between culture and the economy; studies culture as economic activity and in the context of economic development.	Focuses on the relationship between heritage and the economy; role in economic development; cultural industries and their impacts; economics of the arts, artistic goods and services; the growing economic functions of cultural heritage and other economic aspects of heritage policies and practices.	Lichfield (1988), Peacock (1995, 1997), Throsby (1999, 2001, 2005), Klammer (1997, 2002), Nijkamp and Cocossis (1995), Frey (1997), Hutter and Rizzo (1997), Landry (1997), Towse (1997), Klammer and Zuidhof (1999), Rypkema (1999), Mason (1999), Klammer and Throsby (2000), Ready and Navrud (2002), Greffe (2002), Ginsburgh and Throsby (2006), Hutter and Throsby (2008).
Cultural and social geography	Studies geographical aspects of human cultures, focusing on the human—environment relationship; material culture and practices in geographical areas; landscape interpretation.	Explores heritage in its spatial dimensions: location, distribution and scale. Emphasis on the cultural and historic dimension of human activities and societal processes. Centrality of place and nature across cultures. Seeks to holistically re-conceptualize the nature—culture relationship.	Duncan (1980, 1988), Cosgrove (1983, 1987, 1989), Mitchell (2000), Whatmore (2002), Graham et al. (2000), Stacey (1995), Lowenthal (1961, 1985, 1998), Harvey (2001), Von Droste, Plachter, and Rossler (1995).

(continued)

**Table 1** (continued)

Inter-disciplinary fields	Scope and focus	Relevance to the conceptual integration	Key contributors
Environmental and ecological economics	Address the relationship between ecosystems and economic systems in the broadest sense. Deal with human impacts on natural systems, and are more innovative in approach and methodology.	Explore, clarify and formulate sustainable development and sustainability as concepts for the purpose of making them not only more theoretically, socially and politically meaningful, but also operationally feasible. Draw parallels between issues of natural capital and cultural capital, natural ecosystems and cultural ecosystems. Further upgrade and develop the concept of cultural capital towards the context of sustainable development and sustainability.	Norgaard (1988), Pearce (1988), Lele (1991), Costanza and Daly (1992), Mitlin (1992), Pearce and Warford (1993), Estes (1993), Serageldin (1993, 1996a, 1996b), Tisdell (1993), Lele and Norgaard (1996), Mebratu (1998), Frazier (1997), Gidding, Hopwood, and O'Brien (2002), Harris (2000, 2003), Hopwood, Mellor, and O'Brien (2005), Dodds (1997), Dobson (1998), Chiesura and De Groot (2003), Berkes and Folke (1993, 1994); Turner (1999).
Evolutionary economics	Studies why and how the economic world changes. Focus on the dynamics of change and adaptation.	Reflects the inherent dynamic dimensions of the heritage and sustainable development concepts. Builds upon the rich variety of historical change in the evolution of heritage and the historic records for economic processes. Investigates the adaptations and interactions in a changing environment, based on a changing knowledge base.	Boulding (1966), Hodgson (1993), Andersen (1994), Tsuru (1995), Metcalfe (1998), Dopfer (2000), North (1990, 2005).
Development studies and development economics	Originally focused on issues related to developing nations. Major shift in discourses and theoretical frames, reflecting globalization, post-modernity, and diversity, with an emphasis on culture,	Expand and deepen the vision on development by challenging the development of new streams such as "human development" and "culture in development". Emphasize the centrality of culture and redefine culture as	Worsley (1984), Sachs (1984), Appadurai (1986, 1996), Pearce et al. (1989), Anand and Sen (1994), Sachs (1993), Denzau and North (1994), Norgaard (1987, 1988, 1994), Hettne (1995),

(continued)

**Table 1** (continued)

Inter-disciplinary fields	Scope and focus	Relevance to the conceptual integration	Key contributors
	environmental issues, uneven development.	intrinsic element, involved in both the ends and the means of development. Highlight the interrelated nature of cultural heritage and development, and call for adopting a holistic approach in addressing them.	Tucker (1997), Sen (1999, 2000, 2004), Serageldin and Martin-Brown (1999), Schech and Haggis (2000), Cernea (2001), Serageldin (1993, 1996a, 1996b, 1999, 2000), Miyamoto (2000), Desai and Potter (2002), Nederveen (2001), Hettne (2002), Woolcock, Rao, and Alkire (2002), Rao and Walton (2004), Nederveen (1998, 2001, 2004).
Sociology of development and sociology of heritage	Study society, human action, social rules, relationships, processes, organization and development of human social life, from the local to the global level.	Widen and specify the development discourse against cultural and social determinants such as heritage. Provide insights and tools for the understanding and analysis of the growing in significance social context, meanings, values, and functions of heritage. Contributes to democratization of heritage and its field.	Bourdieu (1986), Coleman (1988), Berger (1994), Woolcock (1998), Putnam (2000), Portes (2000), Cernea (2001), Gould (2001), Nederveen (2001), Ogino (2002), Murty and Suchetamurty (2002), Jeannotte and Stanley (2002), Mason (2002), Berger and Hefner (2003), Jeannotte (2003), Riganti and Nijkamp (2005).
Human, social, political and historical ecology	Study interactions between humans, nature and the environment. Focus on the processes of adaptation and co-evolution of nature and humanity.	Provide ecological, communitarian, and ethical approaches to the issues of society and development. View human communities as part of the ecosystems on earth, recognizing the pre-eminence and limits of the natural environment. Adopt systems perspective, integrated approach for	Brown (1970, 1991, 1992), Vayda (1975, 1983), Ellen (1982), Richards (1985, 1986), Ingold (1986, 1988), Oldfield and Alcorn (1991), Crumley (1993), Ellen and Fukui (1996), Milton (1996).

(continued)

**Table 1** (continued)

Inter-disciplinary fields	Scope and focus	Relevance to the conceptual integration	Key contributors
		examining how different factors (physical, political, environmental, social and cultural) can influence the sustainable human-natural interaction and bring it to a more balanced state.	
Urban/rural [town and country] planning	Deals with the physical, social, cultural, economic and environmental development of urban and rural regions and communities.	Recognizes heritage as part of the environment and its conservation as inherent dimension of sustainable development. Puts emphasis on conservation and wise use of heritage as processes of managing change and achieving sustainability. Highlights the significance of the past-present-future continuum for cultural identity, quality of life. Suggests innovative holistic and integrative approaches for the protection, promotion, enhancement and management of heritage and its incorporation in development strategies.	Nelson (1991), Manning et al. (1993), Bizarro and Nijkamp (1996), Darlow (1996), Strange (1997), Fusco Girard (1998), Doak and Lynch (1998), Landry (1997, 2000), De Marco and Torre (1999), Coeterier (2002), Dahlin (2003), Strange and Whitney (2003), Dupagne and Teller (2003), Pinder and Vallega (2003), Stubbs (2004), Nasser (2003), Keiner (2005), Pendlebury, Townsend and Gilroy (2004), Rodwell (2003, 2006, 2007).
Tourism studies	Deals with various aspects of tourism: motives and behaviour of tourists, tourism industry and its management, tourism agents, tourism impacts to economy, society, culture, and environment.	Explores the complex relationship between heritage and tourism, its many implications, and also in connection to wider development agendas. Puts emphasis on the study of sustainability in both cultural heritage and tourism contexts, theoretically and empirically. Provides rich evidence to support the analysis of heritage-based sustainable	Horwath and Horwath (1989), Inskip (1991), Boniface and Fowler (1993), Van Der Borg, Costa, and Gotti (1996), Nuryanti (1996), Herbert (1997), Robinson (2000), Garrod and Fyall (2000), Richards and Hall (2000), Ashworth and Tunbridge (2000), Du Cros (2001), Ishimori and Nishiyama (2001), McKercher

(continued)



**Table 1** (continued)

Inter-disciplinary fields	Scope and focus	Relevance to the conceptual integration	Key contributors
		tourism projects, strategies and results.	and Du Cros (2002), Timothy and Boyd (2003), Leask and Fyall (2006), Timothy (2007), Fusco Girard and Nijkamp (2009).
Cultural/social anthropology and archaeology	Focus on guiding values (culture) and relationships (society). The latter studies origins and evolution of culture in the past.	Recognize the influence of culture in relation to the functioning of society. Make correlations between the heritage of collective thought (myths, language, rituals) and social systems (class, community). See culture as determinant of the dynamics of change (development).	Boas (1911, 1928), Malinowski (1944, 1945), Radcliffe-Brown (1952), Escobar (1974, 1995, 2001), Appadurai (1986, 1996), Merriman (1991), Arizpe (1999, 2000a, 2000b, 2002), Handler (2003), Bender (1993, 2001, 2002), Meskell (2003, 2004, 2005).
Cultural policy studies and museum studies	Explore the nature, function and impact of cultural policies and museums.	View culture and heritage broadly in a social context, as part of the way of life, as well as in the narrower sense of the arts, cultural and heritage industries. Deal with legislation, policies and management of cultural and heritage institutions, as well as with wider discourses as: what should be the role of culture and museums in society.	Bennett (1992, 1995, 2001), Muller (1998), Fechner (1998), Stevenson (1998, 2003), Creigh-Tyte and Selwood (1998), Clark and Drury (2000), Gibson (2001, 2004), Bennett (1995, 1997, 2001), O'Regan (2001), Matarasso (1997, 2001), Poirrier (2003), Jeannotte and Stanley (2002), Pickard (2002), Trimarchi (2004), Turpenny (2004), Prott (2005), Mercer (2005), Pratt (2004, 2005), Ambrose and Paine (2006).

### 4.3 Interdisciplinary Approaches

Being complexly constructed of several significant and interrelated dimensions—economic, environmental, social, and cultural, both concepts necessitate the application of hybrid interdisciplinary approaches to accommodate various perspectives and develop agreed frame of reference.

#### ***4.4 Recognition of Holism and Interdependence***

One of the principles of sustainability is the recognition that no part of any system exists independently of other parts and that all are interconnected. As both cultural heritage and sustainable development seek for symbiosis and balanced integration of the three interconnected systems nature, society and economy, approaches that account for holism and hybridity are considered particularly useful in bringing the two concepts together. Holism (from the Greek word *holos*, meaning entire and total) signifies the idea that all the properties of a given system (biological, chemical, social, economic, cultural, linguistic) cannot be determined or explained by the sum of its component parts alone. Hybridization in knowledge formation can be defined as “borrowing and lending concepts, methods, theories and praxes”, so as to further “stimulate cross-fertilization . . . transform the ways that objects are treated in traditional disciplines . . . [and] generate interlanguages and hybrid knowledge communities” (Dogan, 1996, p. 296; Klein, 1996, p. 134).

#### ***4.5 Management of Multiplicity and Dissonance***

Both concepts are characterized by multiplicity in terms of values, definitions, functions, scales, stakeholders, sectors of involvement and implementation models. Furthermore, as both involve processes, not fixed states, they need balance of interests, dialogue and negotiation to reach consensus among economic, social and political entities.

#### ***4.6 Management of Change***

The concepts are likewise dynamic. They do not resist, but accept and deal with change, seeking sustainability in its management. The latter requires recognizing limits, maintaining carrying capacities, accessing impacts and preventing irreversibility of change where possible.

#### ***4.7 Anthropocentric Approach***

As people are the driving force, means and ends in both heritage and sustainable development, emphasis on the role of people and their participation in evaluation and decision-making is equally present. Nonetheless, according to the now dominant paradigm of “nested sustainable development” (Gidding et al., 2002, p. 192) society and economy should be seen as embedded within the natural environment,

rather than being equal and independent, which understandably assigns priority in all discourses to the protection of the environment.

#### ***4.8 Inter- and Intra-generational Equity***

Built on common ethical and philosophical ground, the two concepts share common concern for future generations and their needs, as well as the rights to participation and access by present generations. In all projects, consideration is equally paid to the distributional impacts of costs and access to benefits across social classes, income groups, locational categories and others.

#### ***4.9 Long-Term Approach and Preservation of Systems Integrity***

As cultural heritage and sustainable development ultimately aim at preserving the continuity in ecological processes, human activities and cultural traditions and sustaining the integrity of life-support systems through time, they likewise take a long-term perspective in regard to planning, decision-making, project implementation and evaluation.

#### ***4.10 Resource Efficiency and Conservation***

The two concepts equally seek conservation of valuable natural, social, cultural and physical resources by saving energy through the enhancement, optimization and wise management of resource use and reuse, as well as the elimination of economic and ecological damage and waste. This implies establishing environment-friendly technologies and life-styles, defined by more sustainable patterns of production and consumption.

#### ***4.11 Respect of Diversity and Community-Centeredness***

Different cultures understand heritage and sustainable development differently. Diversity in all its aspects should be respected and acknowledged, on global and local levels, in theory and in practice. The principle suggests democratization in terms of interpreting both heritage and development, as well as in terms of access to

resources, share of benefits, participation in management and decision-making within communities.

#### ***4.12 Cross-Sectoral Cooperation***

Both necessitate the involvement of many different sectors and agents: global, national, regional and local; public and private; professional, civil, voluntary, and others. Therefore, achieving productive and sustainable partnership among all stakeholders represents an issue of critical importance for reaching equally sustainable outcomes of projects and activities.

The above discussion shows clearly that theoretically both concepts share much in common. With the expanding of the heritage concept toward a broader socio-functional dimension on one side, and the concretization of the sustainable development concept and its practical implementation on the other, the conceptual areas of the two connect and even reach a point of convergence. In this sense, the articulated shared values and principles are considered important to guide the further conceptual development of both, supporting the process of their synergic convergence, so that each one could benefit from the other, translate the other, or become the context for the other.

## **5 Conclusion**

The article brings together the academic accounts of cultural heritage and sustainable development, refocusing the discussion on the identification of an interdisciplinary common ground between them. The theoretical rationale for their conceptual integration is presented by means of a cross-disciplinary interpretive synthesis, based on the acknowledgement that both concepts are variously constructed from social, cultural, environmental, economic and physical viewpoints. To address the problems of knowledge fragmentation and lack of interdisciplinary dialogue that seriously obstruct the fuller understanding of the complex interrelation between heritage and sustainable development, the article suggests the employment of the meta-ethnographic approach, that is gaining recognition in terms of enhancing the analytic capacity and practical value of studies in different fields. The approach is considered essential for developing greater cohesiveness and connectedness in the Heritage studies field, and for elaborating the needed integrated framework in support of theory-building and advancing the science of sustainability in both fields.

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# Towards a Conceptual Model for Heritagepreneurship and Regional Development

Hans Lundberg, Marcela Ramírez-Pasillas, and Anders Högberg

**Abstract** In this text, we present a conceptual model for discussing and analysing what happens when culture, in the form of heritage, and regional development, in the form of entrepreneurship, is juxtaposed (=heritagepreneurship). By comparing case studies from Mexican and South West Scandinavian regions our ambition is to elucidate potentials and limits in different ways of working with regional development using heritage as a mean.

Our case studies showed that heritage becomes staged, enacted, and perceived in very differing ways depending on the ways memories are embraced, constructed or repressed in the heritagepreneurship process. Different meanings thereby give different societal effects, influencing the heritagepreneurship process.

The strategies used in these case studies tend to be located “in the extremes”, from unconscious ignorance or a conscious effort to forget, to efforts to provide full attention and an active awareness of what has happened. We believe that more nuanced strategies for more long-term sustainable heritagepreneurship and regional development are located in-between these extremes.

**Keywords** Cultural heritage • Heritage management • Entrepreneurship • Regional development

**JEL Classification** L1 • L26 • L31 • L83 • Z11

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## 1 Introduction

How can telling the past at historic sites benefit our society? This question has recurrently been discussed over the years within heritage studies and heritage practices, and suggested answers are many (Smith, 2006). In economic scholarly literature, the interface between culture heritage and economy is argued, for example when discussing the culture/creative industries (Bowitz & Ibenholt, 2009).

In this text, we elaborate what happens when culture in the form of heritage, and regional development in the form of entrepreneurship, is juxtaposed. As part of the Swedish cultural policy objectives, heritage is an integral part of regional policy agendas. Thus, heritage politics are more and more addressing social aspects of contemporary life (Högberg, 2013).

From various perspectives, heritage is related to issues on regional development (Skoglund & Jonsson, 2012). Heritage is recognized as a central part of a region's identity, thereby attracting people to places as well as increasing economic flows relevant for the survival of local economies (Ramírez-Pasillas, 2007). At the same time, knowledge of issues related to heritage is often inadequate within regional policy, resulting in that decisions are commonly instrumental rather than creative and development orientated (Blank & Weijmer, 2009). This of course has effects when it comes to regional development.

In this text, we develop aspects of such effects using case studies from two very different parts of the world, Mexico City and Öresundsregionen. By comparing Central Mexican and South West Scandinavian regions, our ambition is to elucidate potentials and limits in different ways of working with regional development using heritage and entrepreneurship as a mean.

## 2 Heritagepreneurship and the Concept of 'Proper'

Heritage is to be understood and conceptualized as something created in social processes. There is a well-established academic distinction between on the one hand a heritage record and on the other hand what is done with it (Holtorf, 2005). But the precise processes by which the heritage record is negotiated and transformed into something useful and used have only begun to be explored (Watson, 2009). The case studies here presented elaborate on such processes. These cases are places with complicated heritage. Such places are often difficult to change and develop, why strategies are needed for dealing with a heritage that is filled with conflicts, contradictions, and traumatic memories and/or connected with negative associations. These strategies are going from unconscious ignorance or a conscious effort to forget, to full attention and an active awareness of what has happened (Smith, 2006).

Anne De Bruin has suggested that heritagepreneurship consists of the activities and actions conducted to acquire and safeguard heritage based resources (De Bruin, 2003, p. 170). Such efforts combine economic and non-economic goals, local

engagement and a variety of actors aiming at using heritage as a benefit for various communities (Johnstone & Lionais, 2004; Katz & Steyaert, 2004; Lundberg, 2002, 2005). Richard Pfeilstetter emphasize that entrepreneurship in relation to heritage must be understood as processes of social change fostered by agency-based and institutionalized innovative and/or conflictive ideas in a social environment within a market-like competition for economical, political and symbolical resources (Pfeilstetter, 2014, p. 5). This means that heritage as well as entrepreneurship are social processes and as such affect society in diverse ways. Consequently, to understand the effects of heritagepreneurship in regional development it is not enough to detail activities conducted to acquire and safeguard heritage as resources, as De Bruin (2003) puts it. We need to understand possible outgrowths and consequences of activities conducted to sustain or contain heritage.

To elaborate on this, we take as our point of departure the concept of proper, as de Certeau (1988, 34ff) understood it when elaborating upon distinctions between strategy/tactics and space/place. In de Certeau's understanding, a proper place is a manifestation of certain powers, an ordered place in which "the elements taken into consideration are beside one another, each situated in its own 'proper' and distinct locations, a location it defines. A place is thus an instantaneous configuration of positions. It implies an indication of stability" (<http://particulations.blogspot.se/2012/08/spaceplace-culture-and-time-part-1.html>). In proper places, consensus oriented mainstream discourses on heritagepreneurship agreed upon by those with main discursive and material powers prosper. Here, de Certeau uses the concept of strategy (in detail introduced in de Certeau, 1988, 34ff) in a very different (and considerably more critical) way relative to the mainstream understanding of this concept, to analyse processes that generates and normalizes these consensus oriented mainstream discourses. These mainstream discourses often "pose as entrepreneurship" and are also among the big masses perceived as "being entrepreneurship" (as they are for example correctly registered start-ups, creating jobs). But looking at them more closely, they often are just replicas of what already exists in abundance (i.e. just another filial of a franchise brand).

As contrast, regarding in-proper places (not a de Certeau-concept, but derived by us in order to contrast proper places), our working hypothesis is that more vital, non-mainstream discourses on heritagepreneurship may prosper. We base our understanding on in-proper on the way de Certeau's use the concept of tactics (in detail introduced in de Certeau, 1988, 36ff) which he understands as processes of creative friction that "juxtaposes diverse elements in order suddenly to produce a flash shedding a different light on the language of a place and to strike the hearer" (de Certeau, 1988, 37ff). Such surprising actions, adding to or even fundamentally changing the physical structure as well as the behavioural grammar of any given place, more often than not make more in-depth use of generic human capacities such as being, acting and thinking creatively and innovative.

To sum up, we in Fig. 1 elaborate on a basic matrix of proper and in-proper heritagepreneurship as a base for discussing our case studies.

*Proper mainstream heritagepreneurship (A)* focus on *generics*, i.e. successfully replicating some well-established practice (i.e. gentrification of historically significant urban neighborhoods), calling it entrepreneurship, because it satisfies agreed

	Embracing memories	Repressing memories
Organising logic mainly based on <i>ordering</i> activities, people and meeting places	A) Proper mainstream heritagepreneurship	B) Proper forgotten heritagepreneurship
Organising logic mainly based on <i>juxtaposing</i> activities, people and meeting places	C) In-proper revitalized heritagepreneurship	D) In-proper selective heritagepreneurship

Fig. 1 Proper and in-proper heritagepreneurship

upon minimum definitions (new jobs, start-ups) within mainstream discourses that perceive this “as entrepreneurship”. Proper mainstream-processes blend memories with specific activities, people and meeting places and order it all into a coherent whole; a relatively friction-free place for everyday consumerism, with Sunday culture consumption as peak of the week.

*Proper forgotten heritagepreneurship (B)* focus on *abandonment* of non-preferred memories. Such processes can be the result of intended efforts by specific actors to contain memories, unintended decision processes or lack of public resources. Proper forgotten-processes can be combined with an “extreme makeover”-strategy (building something completely new and historically anachronistic on the place of the memory) or with a “fade to grey”-strategy (slowly passing a non-preferred memory into decay and forgetting by using non-action as main mode of agency and non-sense as main mode of communication).

*In-proper revitalized heritagepreneurship (C)* focus on *context*, i.e., the specific requirements in any given memory context for staging a heritagepreneurship venture that may be perceived as innovate enough to win an immediate audience in order to get going (establishing the venture) as well as to stand the test of time in order to last (consolidating the venture by making it profitable over time via maintaining or increasing the “cultural cred”, not at the expense of it). Besides this practice-argument—that in-proper heritagepreneurship nurture innovativeness in more open-ended ways relative to proper heritagepreneurship—we also want to stress that such a focus also is a respond to calls within entrepreneurship research that “argues that a contextualized view on entrepreneurship can add to our knowledge of when, how, and why entrepreneurship happens” (Welter, 2011, p. 176).

*In-proper selective heritagepreneurship (D)* focus on *specific memories*, which are to be remembered at the expense of others. Such places are renewed specifically with a preferred target audience in mind (i.e. “the creative class”), for which distinct activities and tailor-made meeting places are developed. Non-target audiences are

encouraged to visit but their role is at large to function as extras and props on a stage developed for “specific others”.

### **3 Methodology**

This is a conceptual paper with the main purpose of presenting the conceptual model outlined in Sect. 2. Empirical illustrations to this conceptual model are generated through comparing multiple case studies from Mexican and South West Scandinavian regions. With this, our ambition is to elucidate potentials and limits in different ways of working with regional development using heritage as a mean.

## **4 The Four Cases: Centro Histórico and Tlatelolco in Mexico City and Lomma Eternit and BT Kemi in South West Scandinavia**

### ***4.1 Centro Histórico and Tlatelolco in Mexico City***

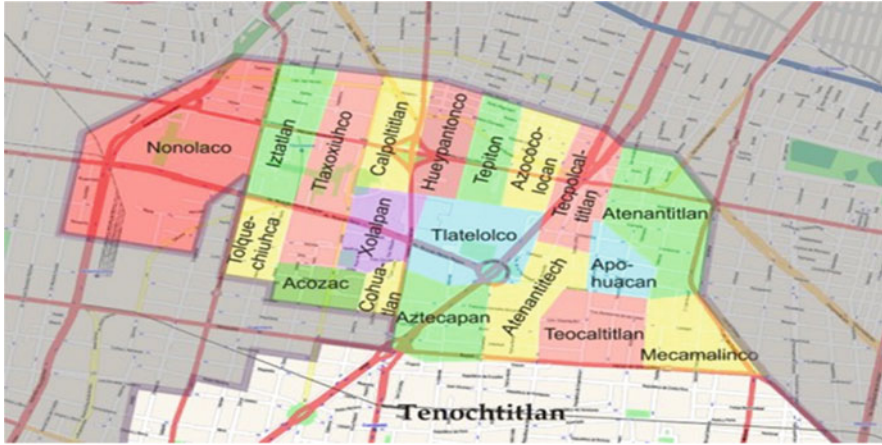
UNESCO declared the historical center of Mexico City a World Heritage in 1987. Centro Histórico is the central neighborhood in Mexico City that roughly covers 9 km<sup>2</sup>, occupies 668 blocks and contains around 9000 buildings of which around 1550 have been declared historically important ([http://en.wikipedia.org/wiki/Historic\\_center\\_of\\_Mexico\\_City](http://en.wikipedia.org/wiki/Historic_center_of_Mexico_City)).

At the heart of Centro Histórico is the Zócalo, the main square. In one corner of the Zócalo is the main archaeological site holding the remains of the city of Tenochtitlan, the capital for the rulers of the Mexica Empire (or Aztecs as they are called in occidental historiography since Alexander von Humboldt in 1810 coined the term).

The Mexica/Aztecs are the indigenous people of the Valley of Mexico, belonging to the Nahuatl people. Different branches of the Mexica/Aztec people founded several cities around AD 1200 in this area, of which Tenochtitlan was the capital and political center of their empire and Tlatelolco the more commercially oriented sister city of Tenochtitlan (located just north of it, see Fig. 2).

Tenochtitlan is thought to have been among the largest cities in the world at that time and the existence of such a splendid non-Christian civilization was hard to digest for the Spaniards. Instead, Hernán Cortés made “sober” notes in his letters to the Spanish king, like “sixty thousand people come each day to buy and sell...” (<http://www.livescience.com/34660-tenochtitlan.html#sthash.ZtKuQFC9.dpuf>).

We all know what then happened; how the conquest of Mexica/Aztec territory was done, how Tenochtitlan, Tlatelolco and the other cities in the Mexica/Aztec empire were destroyed, how Lake Texcoco was drained and how the city we



**Fig. 2** Barrios of pre-Colonial Tlatelolco over modern map. *Source:* [http://en.wikipedia.org/wiki/File:Tlatelolco\\_Barrios.png](http://en.wikipedia.org/wiki/File:Tlatelolco_Barrios.png)

today know as Mexico City was founded by the Spaniards by literally building it upon the ashes and dust of the destroyed capital of the Mexica/Aztec empire.

As these two archaeologically and culturally highly significant historical twin-cities are located within the formal territorial boundaries of Centro Histórico, as they both are officially declared Zona Arqueológica and as Centro Histórico as such has UNESCO World Heritage status since many years back (1987), one might have expected equal interest in and focus on the two cities alike. This is not the case. Since the all-time-low of “forgetting” in the 1980–1990s, when Centro Histórico was plagued by decreased population, increased criminality and buildings deteriorating, the combined effect of becoming UNESCO World Heritage and the richest man in the world (Mexican tycoon, Carlos Slim) being in need of revamping his image, changed the destiny for the two cities.

Tenochtitlan became an “archaeological diamond” (<http://whc.unesco.org/en/news/863>) through the big scale revitalization project Fundación del Centro Histórico de la Ciudad de México, involving hundreds of organizations and hundreds of millions of dollars of investment over a long period of time, with the Zócalo as symbolic center for the renewal. The revitalization of the Centro Histórico led to the renewal of old buildings that were rented to coffee places, restaurants, bars, retail shops and associations. Several streets were closed down to car traffic encouraging the continuous flow of pedestrians. Museums, art galleries, old dance halls and old cantinas became even more popular. Local police forced informal street vendors out of their locations. A group of activists that gathered in the Alameda Central on Sundays to disclose news not published by media was also re-located.

This renewal-through-gentrification project gradually made Tenochtitlan attractive for “preferred visitors” to take a stroll in streets, visit the archaeological sites

and museums and socialize with friends in cool places at the Centro Histórico, see Figs. 3 and 4.

In contrast, Tlatelolco firmly remains in the realm of the forgotten since the massacre of over 300 students there in 1968; “A massacre turns a place into a garbage can”. This quotation by the writer Juan García Ponce refers to the state crime that ended the Mexican student movement on October 2, 1968, resulting in a still unknown and controversial number of deaths (Arroyo, 2009, p. 51).



**Fig. 3** Big scale model of Tenochtitlan at the Zocalo, Mexico City. Photo: Hans Lundberg, 2010-12-05



**Fig. 4** Big scale Christmas and New Year illuminations at the Zocalo, Mexico City. Photo: Hans Lundberg, 2009-12-21

Tlatelolco is a place of historical significance long before this, though. Founded by a dissident group of Mexicas in 1338, it became an important center for commerce. Tlatelolco was the last place where the Spaniards faced resistance in 1521 but ultimately Tlatelolco was destroyed and a square (Plaza de las Tres Culturas), the Church of Santiago and the Imperial College of the Holy Cross was built on its ruins. During the 1960s, Tlatelolco was modernized through the development of new buildings and the location of UNAM high schools, thereby making Tlatelolco an important meeting place for students.

In October 2, 1968, students from UNAM and Instituto Politecnico, in their quest for the right of freedom of speech and democracy, gathered in Tlatelolco to discuss how to level up their protests and obtain support from more actors. Government became afraid of alternative emergent powers that could be developed and sent different groups of armed forces to stop student's protests. It soon became very violent. Students hiding from armed police in the Chihuahua building located in front of the square of Plaza de las Tres Culturas were forced out. In despair, students tried to hide in the Church of Santiago. The church closed its doors, leaving students exposed to armed forces. One by one students were shot down. Police closed all access to the square, impeding people from realizing what has happened. The place was cleaned up and the many hundreds of bodies were taken away. Next day, no single newspaper or news program reported about the event.

For crimes on this scale, few cover up attempts hold up in the long run though, and the students made this more than obvious by promptly “re-naming” Plaza de las Tres Culturas to “Plaza de las Tres Gorilas” (referring to the three main responsible for the massacre; President, Gustavo Díaz Ordaz; Ministry of Internal Affairs, Luis Echeverría Álvarez; President's Chief of Staff, Luis Gutiérrez Oropeza), see Fig. 5



**Fig. 5** Main Entrance to Plaza de las Tres Culturas/“Plaza de las Tres Gorilas”, Tlatelolco, Mexico City, as of 1968. Photo (of the original photo exhibited at the Museo Memorial del 68, Tlatelolco, Mexico City): Hans Lundberg, 2011-05-08





**Fig. 6** Main Entrance to Plaza de las Tres Culturas, Tlatelolco, Mexico City, as of 2011. Photo: Hans Lundberg, 2011-05-08

for the legendary photo of this “re-naming” (before it hastily was washed away) and Fig. 6 for how the entrance to the plaza looks as of today.

The massacre was silenced for many years. Relatives could not persuade any government to raise a memorial to commemorate all the people that were killed. In 1985, another tragedy took place; many residential buildings were damaged or destroyed due to the Mexico City earthquake and hundreds of the over 10,000 victims died in Tlatelolco. In 2005, Centro Cultural Tlatelolco of UNAM was opened to the public. Thus, an exhibition to remember both the 1968 massacre and the 1985 earthquake were installed. In 2014, the federal government plans to open a museum and a library, but still there is no mention of the massacre.

#### ***4.2 Lomma Eternit and BT Kemi in South West Scandinavia***

The Skandinavisk Eternit Company (Lomma Eternit) was founded in 1906, specializing in the production of a building material called Eternit. The company had great success, and Eternit came to be known as ‘the one building material of Swedish modernity’ (Martinsson & Schlyter, 2005). Eternit consists of a mixture of cement and asbestos fibers. Asbestos gave the material strength and made it water- and fireproof, qualities that contributed to its success (Fig. 7).



**Fig. 7** The Skandinavisk Eternit Company (Lomma Eternit) in the early twentieth century.  
*Source:* Eternitbolaget efter 40 år, 1946

But today we know that asbestos is also lethal. The fibers became plastered on to the factory workers' lungs, and about 250 of them eventually died a painful death either from lung cancer or by slowly suffocating. The company had been aware of the dangers involved in working with asbestos since the 1950s. Medical examinations carried out by the company showed that several workers had died after long illnesses that were caused by the environment in which they worked. Nevertheless, the company chose to deny the dangers, went on covering up the truth about the lethal environment and did little or nothing to protect its employees as they went



**Fig. 8** The office building for Skandinavisk Eternit company. Photo: Anders Högberg

about their work (Andersson, 1980). This has gone to history as the “Asbestos working environment scandal”. In 1976 the sale of Eternit products was prohibited, and a year later the factory closed down.

In 2003, after years of planning, the elected political assembly of the municipality decided to transform the old and at that time shabby industrial area of Lomma Eternit into a modern seaside residential area. The aim was to create a new, attractive urban district. During this process, the area was completely transformed. Antiquarian experts defined the industrial heritage values within the area. Their report focused on objects and established that only a few buildings with connections to the industrial history still stand at the site. It was stressed that “these are essential to protect and preserve as monuments over the important role the industrialism has had for the growth and development of Lomma municipality” (Reisnert & Wallin, 2002; authors translation). The office building from 1937 was highlighted as a notable example of a building that needed to be protected, see Fig. 8.

However, nothing in the preservation process highlights the fact that the area once was a flourishing industrial area. There is nothing unique about the preserved office building in itself. To understand it today as having once been part of an industry, you need to know that, in the past, office buildings were generally located in the same area as factories. For those who remember the place as a thriving industrial area, the office building is a reminder of old times. But to those who do not have these memories, the office building says nothing. It just looks like all the other houses built in the area. The preserved building only represents architecture; no narratives about the working environmental scandal that once took place at the site are manifested in the preservation. In this sense, the heritagepreneurship conducted at the site reflects more a process of forgetting than of remembering.



**Fig. 9** The Lomma Eternit area today. Photo: Anders Högberg

The way the industrial heritage at the site is visualized, perfectly mirrors the symbolic importance the place has for the local politicians and other decision makers, as a vision of the future, free of negative loadings from the past (Kvalitetssprogram för Lomma Hamn, 2002). The former industrial district has become the kind of symbol of the prosperous future that it was meant to be. It has been transformed from a memory connected to a working environmental scandal into a luxury residential area with a charming but harmless heritage, see Fig. 9.

The area has attracted high earners, who make a significant contribution to the prosperity of the municipality by paying taxes and spending money in the local shops. But the area mostly attracts inhabitants from the same socio-economic groups, leading to segregation problems generating conflicts between social classes and generations (Högberg, 2011).

Our fourth and last case brings us to a neighboring town, just about 22 km north of Lomma, called Teckomatorp. When hundreds buried and corroding waste containers with toxic substances were found in 1975 on the BT Kemi's factory area in the small town of Teckomatorp, one of the largest Swedish poison scandals of modern times was a fact. By the cover of night, the BT Kemi Company had for years been systematically disposed residues from their manufacturing of plant toxins and buried the toxic barrels within an area of the factory property. When the media uncovered the scale of the scandal and prosecution for environmental offence against the company was raised, BT Kemi was putted into bankruptcy. Teckomatorp was left with a highly polluted industrial site.

Since then, thousands more or less corroded barrels filled with highly toxic content have been dug up at the site and the name Teckomatorp has become "world famous" through the BT Kemi environmental scandal. In 1979, the old factory building was demolished. But, the factory area is still toxic and in the early 2000s



**Fig. 10** The BT Kemi area, then and now. *Source:* <http://www.svalov.se/ovrigt/ga-direkt/bt-kemi-efterbehandling.html>

the local municipality and the Swedish Environmental Protection Agency reached an agreement on the cleanup costs and efforts, see Fig. 10.

In 2005, work started to refurbish the BT Kemi area. Besides remove all toxic waste, an important goal of the project is that the image of and attitudes to the name Teckomatorp shall be changed in such a way that the place is no longer stigmatized by the BT Kemi scandal. Another goal is to remembering what happened at the place as a way to learn from the past. The environment scandal is well known and Teckomatorp has by the cleanup of the factory site come to be not only associated with a poison scandal, but also with positive actions and change. In December 2009, a nature park was inaugurated in the parts of the area that are cleaned and decontaminated, see Fig. 11.

The area is today an appreciated part of Teckomatorp and the environmental scandal is not just a stigma, but also an important experience to learn from as well as an appreciated recreational area as people increasingly are adopting the newly inaugurated nature park (Högberg, 2011).



delaying, systematic avoidance, ignorance and counter-arguments using technicalities or legal loopholes to avoid discussion on content and what really matters. Such discursive practices is a kind of art in Mexican politics, a specific Mexican governmentality, an ordering logic that steer away the files of complaints into never ending columns, categories, registers and other abstractions that make one wish for Kafka, Musil or Foucault to rise from their graves and write up yet another moment 22, man without qualities or another archaeology of knowledge to once and for all “analyse away” such discursive practices whose sole purpose is to produce subjects that cries without weeping, talks without speaking and screams without raising their voice (if to paraphrase U2s famous ‘Running to Stand Still’-song). Gradually (but very slowly) though, Tlatelolco is moving towards *in-proper selective heritagepreneurship* (quadrant D in Fig. 1) as government plans to build a library and a museum linked to the archaeological site of Tlatelolco. The exhibitions of the Centro Cultural Tlatelolco created a space of reminiscence through the work of volunteers, universities (i.e. UNAM), academics and non-profit associations that fight for keeping the memories of the space alive.

The cases of Lomma and Teckomatorp are examples where the heritage of highly polluted industrial areas with strong historical associations from important parts of modern history has been processed.

In the case of Lomma, at a first glance heritagepreneurship looks like *proper mainstream* (quadrant A in Fig. 1). But the initial processes of heritagepreneurship actually repressed the memories of what ones happened at the site. A nice neighborhood was created which is highly appreciated by its inhabitants. Over time, tensions caused by segregation have become a lived experience in the area though, gradually moving it towards *proper forgotten heritagepreneurship* (quadrant B in Fig. 1).

In the case of Teckomatorp, the material heritage is not preserved. Initially the outspoken ambition was to transform the site it into something not remembered (*proper forgotten heritagepreneurship*, quadrant B in Fig. 1). But gradually awareness within the community arose on the importance of remembering what has happened at the site, at least for the “close ones”, the ones now living there, thereby moving heritagepreneurship towards *in-proper selective* (quadrant D in Fig. 1). In the most recent phase, memory lives on converted into an immaterial heritage and an outspoken *proper mainstream heritagepreneurship* approach, manifested in a nature park (quadrant A in Fig. 1).

A lesson learned from the case studies here discussed is that the way heritage becomes staged, enacted and perceived as proper, in-proper or a mix of both, depends on the way memories are embraced, constructed or repressed in various phases of the heritagepreneurship process. Different meanings give different societal effects to the heritagepreneurship process. Overall though, the strategies used in these case studies tend to be located “in the extremes”; from unconscious ignorance or a conscious effort to forget, to full attention and an active awareness of what has happened. We believe that more nuanced strategies for more long-term sustainable heritagepreneurship and regional development are located in-between these extremes.



**Fig. 12** Public display of the investment sums related to the archaeological excavations of Templo Mayor, Centro Historico, Mexico City. Photo: Hans Lundberg, 2014-07-11

In sum, heritage is more and more appreciated as an important tool for regional development. It is also increasingly important to communicate to citizens and visitors “just how much” appreciated it is, see example from the “archaeological diamond” of Tenochtitlan in Fig. 12.

Our case studies, and using the herein proposed conceptual model for analysing them, reveal that the effects of heritagepreneurship differ radically depending on how the social processes in the making of heritage are handled. Such processes need to consider opening a dialogue with universities, civic society and entrepreneurs. Such an inclusive process goes beyond short-term political gains to prioritize sustainable regional development. Thus, to understand processes created by juxtaposing heritage and entrepreneurship is vital for nurturing a sustainable regional development. Our case studies and conceptual model further show that an important issue is to clarify what society means and aspire to in terms of sustainable regional



development and how heritagepreneurship can lead to these effects. In sum, we see the herein proposed conceptual model for analysing heritagepreneurship and regional development as a tentative but potentially useful analytical tool for the purposes here outlined.

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# Cultural Product and Cultural Communication as a Dynamic Bipolar Interaction and Creative Contribution to the Structural Recompiled of the Local Cultural Units

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**Abstract** The conditions of the contemporary cultural environment make the reinforcement and adaptation of the cultural structures mandatory, depending on the corresponding emerging demands and expectations, which designates the effective application of each state's cultural policy as a priority of paramount importance. This way, what is aimed at is that the produced cultural products are of high quality and competitive character, able to attract the public's interest. In the same framework unavoidably belongs the action of the individual cultural enterprises, which are asked to safeguard their sustainability, to renew their operational practices and to respond both productively and communicatively to the high cultural demands of the era. A characteristic case is the basic cultural body of the Municipality of Karditsa, the Municipal Cultural and Public Benefit Enterprise of Karditsa (DI.K.E.K)-Greece, where an outlining of its environment is attempted, so that the factors responsible for its functional weaknesses are defined, while a vigorous organizational redesign is suggested, which is estimated to secure conditions for its more effective operation, high levels of production of cultural products, an upgraded communicative process and ensure that the cultural needs of its audience on a local level are sufficiently met.

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**JEL Classification** L15 • L82 • M14 • M30 • R23

## 1 Introduction

The global and especially the European cultural developments that took place over the past three decades influenced significantly the spatial reality of the various states, leading them to the adoption of “creative productive” policies for the re-design of the public and private space on a local level, with an emphasis on the cultural development of the cities and the surrounding areas, thus aiming at a more efficient regulation of their residents’ socio-economic life (Scott, 2001).

This change functioned as a factor that triggered in the cities and their surrounding areas a continuously growing need for the creation of a recognizable and totally competitive cultural “brand name” (Ashworth, 2009; Karavatzis, 2005), since, given that nowadays the democratization of culture and arts, which represent the increased individual and group participation in the production and consumption, dominates, the main concern is the attraction of the audience’s interest and the claim to its restricted time, energy and support as well as the transmission of the produced cultural ideas to wider social groups, since the disengagement from a restricted, sophisticated, elitist view of the offer and indulgence in cultural products seems indispensable, without social discrimination as far as their accessibility and consumption are concerned (Kakkou, 2009; Pratt, 2004).

Within this framework the local government takes on a leading role in the encouragement and promotion of a significant cultural initiative and in the promotion of the local cultural economy, acting either independently, or in cooperation with specialized state and private bodies, thus supporting a new scheme of a corporate cultural relationship (Bitsani, 2004). In Greek reality though, it is observed that the existent layout of the cultural structures necessitates a generalized structural redesign of the current cultural institutions, assisted by a cooperative perception of all the creative and managerial bodies, for the best promotion of the aspects of culture in all geographical levels possible (Chambouri-Ioannidou, 2003).

Besides, particularly problematic has recently appeared to be the situation on a local level, with the direct consequence of downgrading not only the importance but also the quality of the produced cultural goods. Although several Local Government Organizations, as significant partners on the cultural stage, have created important cultural centers, their majority displays a managerial gap, so that the produced and offered cultural product is qualitatively downgraded and appears unable to attract the audience’s interest (Chambouri-Ioannidou, 2002). The situation undoubtedly becomes even worse due to the weakness of the local cultural action to suggest alternative competitive forms of cultural activity, or its making decisions which in most cases lack a complete and long term consideration.

Without being an exception to the rule, in a similar condition has recently been one of the once leading enterprises of cultural and social profile, the Municipal Cultural and Public Benefit Enterprise of Karditsa<sup>1</sup> (*hence DI.K.E.K.*).

This enterprise constitutes the major cultural body of the Municipality of Karditsa. However the highly competitive conditions of the cultural environment in which it activates, the absence of satisfying and regular financial support by the state and local bodies of jurisdiction, as well as its close dependence upon the given municipal authority which makes various decisions by the preference of the occasional principal, compose an organizational and productive background with bureaucratic features, unable to set achievable goals, suffering from the of dynamic strategic decisions and plans for action, action failure and deviations from the consumer audience's expectations, resulting in DI.K.E.K displaying a deficit in quality cultural products and significant cultural contribution and in effect a lack in cultural communication with the consumer audience (Kakkos, Aspridis, Sdrolias, & Belias, 2014; Sdrolias, Binioris, Aspridis, & Kakkos, 2014).

Given the above references, the aim of this paper is—through a theoretical and research approach—, to find out and estimate the value of the provided cultural product of this cultural unit along with the process and degree of mutual cultural communication with the consumer cultural audience. Special emphasis was placed on both these levels since they constitute the main defining factors expressing DI.K.E.K's cultural dimension, and the results-conclusions from these two dominant factors can contribute to the development of a vigorous structural redesign so that the specification and emergence of its role is made possible.

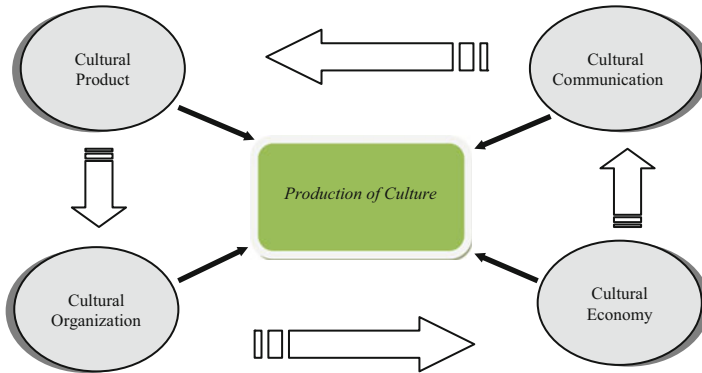
Through these efforts it is expected that its profile will be clarified, providing a sense of unity and a targeted direction of cultural action, that will allow it to overcome the existent organizational and production difficulties and be guided towards a continuous flow and rendering of high quality cultural work. Thus, the satisfaction of the local cultural needs is made possible, dialogue and audience trust is reinforced, along with its consequent participation in the cultural events (Economou, 2003; Kakkos et al., 2014; Paschalidis, 2002).

## 2 Literature Review

The field of study of the “cultural product” and “cultural communication” includes a traditionally interdependent productive relationship between these two pillars which finally results in an essential analytical connection with the subject of cultural organization and cultural economy (Kakkos et al., 2014; Pratt, 2004; Sdrolias et al., 2014) (Fig. 1). Yet, a holistic approach and prospect for “culture production”,

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<sup>1</sup> The town of Karditsa, with a population of about 45,000 citizens, is the capital of the Prefecture of Karditsa, which is a Prefecture of sheer agriculturally and public sector employed people, located in the center of Greece, and belongs in the District of Thessaly.



**Fig. 1** Main factors and their inter-connections for the production of culture. *Source:* Own depiction

which from various aspects constitutes the joint conclusion of the diverse interactions of the previously mentioned relationships, hasn't been researched in detail (Blaug, 2001; Kakkos et al., 2014; Scott, 2008; Sdrolias et al., 2014).

The value of this approach is that it aims at presenting cultural outcomes as a result of collective effort and innovative mood from several participants that are interconnected with the organization of production and the economy of culture (O'Connor, 2010; Pratt, 2004). That draws our attention to the creation of various flexible and mainly middle-class cultural units (Březinová, 2013; Holátová & Březinová, 2013), in which, the mere production of creative and innovative ideas will not be enough, without their transformation into high added value cultural products, which will be available for "consumption" by their cultural audience<sup>2</sup> (O'Connor, 2010; Scott, 2008).

The response to these consumerist needs require faster and more detailed information flow and bilateral communication between the cultural units and the cultural audience—primarily the local one—as well as their ability to respond entrepreneurially more effectively to the constantly increasing demand, through a more flexible production and social networking process. For the development of mutual trust though, both the production process and the social networking of these units ought to be carried out within limited geographical boundaries that will be determined by the culture and the regulatory interventions of the local ecosystem (Kong, 2005). Additionally, they should be adapted to the individual features and the established social and cultural traditions of each place, rejecting any kind of commercial external influences, which could spoil the character and profile of the local cultural mentality (Markusen, 1996, 2006; Wolfe & Gertler, 2004).

<sup>2</sup> Since the end of the 1980s, several specialists and scientists started to talk about a significant turn from the massive production of culture to more flexible specializations, a result of the increasing volatility of the consumer markets. Predictable motifs of massive cultural consumption have been replaced by smaller specialized markets and by the transmission of those cultural products that had a higher "symbolic" rather than financial content and were able to attract new ways of building a social identity away from the up to then directive (O'Connor, 2010).

Otherwise, we will have to deal with a massive production of cultural products, through which the citizens' cultural needs and particularities will in most cases be crushed (Bitsani, 2004), which could signify a general decrease in their symbolic function concerning output (Scott, 2008). The main feature of such a process is standardization that is the limitless recurrence of the same issues and motifs. This standardization doesn't concern only the products themselves, but the audience's response as well. It addresses the masses, but collectivity isn't promoted, since the individual acts as a passive recipient of the various messages therefore undervaluing the process of thinking and of creative reaction (feedback)<sup>3</sup> (Adorno, 2003).

The cultural products are mirrored through a "usage value" that has actually to do with the degree and duration of satisfaction of the cultural needs. Since their production is costly, there is a strong need for new and different cultural products, in which the final recipients will recognize an authenticity of meaning, content and total enjoyment. That is why these products tend to have a limited life span, and are overcast by an intense effort for maximizing their profits.

The administration and management of the cultural units is undoubtedly a very interesting field which allows people to combine entrepreneurship and organizational skills with artistic concerns, expressed through cultural activities that usually manage to make a difference in the lives of people and their communities (Throsby, 2010). Over the past few years however, the administration and management of these units is confronted with particular distrust, given that they require increased state funding, at the cost of other social needs, for a series of non-successive production functions, where it is often the case that the artistic vision outweighs the consumer audience's demands and in general the conditions of the cultural market (Colbert, 2009; De Monthoux, 2004).

### 3 Theoretical Approach

The need for the survival of the cultural units within an intensely competitive setting, the lack of sufficient financial support, as well as the constantly increasing administrative conservatism and the uncontrollable managerial gap, triggered a generalized sense of cultural insecurity and fluidity in Greece (Tzivakou, 2008).

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<sup>3</sup> According to Adorno (2003), those holding leading roles of power and the powerful economic lobbies, took absolute advantage of the technological developments and invented the mass production of cultural products (also known as mass culture) in order to control human consciousness. These goods are promoted and offered systematically and purposefully standardized, while aiming at imposing new aesthetic models which have nothing to do with beauty and aesthetics but simply serve the at times financial and political purposes. Mass culture doesn't aim at questioning the status quo, but reproduces and empowers the dominant system. Although it was invented to fill the individual's free time by offering entertainment and amusement, it also distracts him/her from the real problems by inactivating his/her thought, spontaneity and imagination.

Traditionally, the administration and management of cultural units includes duties that lead to the planning, design, organization, production, control, distribution, trading as well as the financing of the cultural products (Koutouzis, 1999; Sdrolias et al., 2014). Yet, in the case of the cultural units of reference, these organizational and managerial activities ought to aim at the development of autonomous structures of cultural production, without however excluding the occasional use and utilization of specialized means of production and communication networks of supplementary cultural groups or even of cultural groups of limited local range, whose work will necessarily be coordinated by the leading central local cultural unit (Evans, 2009; Scott, 2004).

The crucial issue is at this point in what ways will the various local bodies planning cultural policy be able to benefit from these complicated tendencies, for purposes of local cultural and therefore, to a certain extent, financial development. The response of most specialists in the field of culture seems to provide a series of clear and concrete directions. The first and relatively simple direction is the restart of the cultural unit with the means and resources it already has and the gradual building up of its future with the “latent” chances it can take advantage of. The various local competitive advantages could be chances of this kind, such as the various local symbolisms established on their cultural goods which are instilled with authenticity and folklore (Molotch, 2002), the local cultural creativity, the diverse “non-negotiable external factors” and the established beliefs, as well as the developed bonds of trust and of common goals resulting from the common knowledge of the local conditions, of the institutions and perceptions (Grabher, 2001; Scott, 2004).

Another direction follows, that of the production and utilization of the local “silent” knowledge and wisdom, which cannot be easily transmitted or reproduced outside these local conditions and which is therefore a strong competitive capital (Gertler, 2003; Malmberg & Maskell, 2006; Simmie, 2003), as well as the existence of a notable local “creative class”, with unexploited talented individuals with higher cultural skills and inherited cultural experiences, who can intervene in crucial financial and social circumstances as far as the production process is concerned, so as to liberate those co-operations that lead to higher levels of cultural production, innovation and competitiveness (Florida, 2002; Scott, 2004).

Additionally, a further clear direction is the designation of the rich local “ethical economy”, which can eliminate the deviations and possible abuse of the complexity of the various networks by infamy and other social repercussions and which could become a persistent emotional investment during an attempt to attract and approach communicatively the cultural audience (Banks, 2007). Finally, it is suggested that people realize that the units producing cultural goods, on the level of their production and commercial transactions and of the job market too, function almost always more effectively when their premises and the people from which they are made up display a relative degree of geographical integration (Scott, 2001). All these reveal that a close connection between the place and the system of production can lead to more productive results and to stronger communicative and cooperative combinations (Scott, 2001, 2004).



It is therefore necessary that each local cultural unit operating in conditions of intense insecurity and social doubt, try to oppose and promote consciously a partial or whole scale restructuring so that it finally manages to form an undivided and sound organizational entity which will contribute to the improvement of the quality of the produced product and of its consumer audience's preferences, reinforcing thus the image and the status of the area in which it activates culturally (Lloyd & Clark, 2001).

### ***3.1 DI.K.E.K and Its Developmental Course***

DI.K.E.K is managed by a 9/member Board of Directors, characterized by close dependence upon each municipal authority, since the majority of its members is determined or influenced by the latter. This fact creates a totally problematic organizational environment with the result of a continuous surge of the managerial and administrative deficits, outlining a particularly problematic prospect (Sdrolias et al., 2014; Tegos, 2009).

Of course, if a review of the actions over the years of its function is attempted, despite the deficits and omissions, it can be found out that it offered notable cultural work, since it constituted the main supporter of the foundation, renovation and re-operation of several significant cultural centers in the town of Karditsa and the surrounding area, while it also initiated a number of cultural activities. In alignment with its institutional concept, it has never adopted a rationale of competition towards the corresponding bodies of the Prefecture. On the contrary, it often cooperated with them successfully, thus highlighting its leading profile in the area's cultural events (Vouzas, 2012).

However, in order for someone to have an overall view of the current situation, it should be admitted that DI.K.E.K didn't manage to adapt on time to the changes of the domestic and international cultural setting, while it displayed a high degree of communicative introversion resulting from the lack of information exchange with its audience, concerning their cultural needs and preferences. Thus, it has proven relatively inefficient in the creation and offer of products of high cultural value that could secure an added value within its area of action, focusing mostly on the amenities, both common and conventional ones.

### ***3.2 DI.K.E.K's Wider Environment***

The cultural units are subject to a process of interaction with their wider environment and as constituent parts of it, they are forced to adapt their function to its complicated processes. This environment consists of those forces that influence their goals, their structural design, planning, operation and management and formulate to a certain extend their developmental course. Therefore an elaborate

“environmental inquisition” is required, so that these factors that affect and determine the course of each cultural unit is defined (Brownline, 1998). This environmental inquisition, as an “open” system (Miettinen, 2006; Montana & Charnov, 1993), recognizes and records a total of concrete elements that coexist in this environment and determines the factors and the relationship among them (Mullins, 2007). On the basis of the process of environmental inquisition, the research of the parts of DI.K.E.K’s wider environment is important, so that its current contribution to the local cultural development is made clearer and if a production gap is revealed, a structural re-design is suggested, so that the continuous and maximum cultural contribution and social benefit is secured.

### 3.2.1 DI.K.E.’s Outer Environment

Like every cultural unit, DI.K.E.K, ought to research and fully understand all of the external factors of the wider cultural environment that influence it and determine to a certain extend its developmental course. Therefore, through this process of inquisition and of drawing additional qualitative and quantitative information, its provided work is made more understood, while its organizational needs are also more efficiently evaluated. Besides, its year-long operation has revealed a diverse series of factors of the external environment that affect directly its structural and production profile. Among these factors, the most dynamic and diachronically lasting seem to be the following:

- *Domestic and international competition:* Some countries’ or even cities’ aspirations about the creation of cultural units that would signify their uniqueness and distinguish themselves within a busy market of domestic and international tourism, in combination with the needs of the up-coming cultural industry for the creation of the most exciting cultural destinations, formulated a dynamic and complex competitive setting (Lord, 2008; Richards, 2014). Its partial understanding and analysis isn’t sufficient for the existential substance of a cultural unit, if not accompanied by the ability to define its strategy, goals, actions and ways of its competitors’ response (Frey, 2003; Jeffcutt & Pratt, 2002).

In the biggest part of its year—long course, DI.K.E.K didn’t face particularly competitive problems. Pointing out disposition of cooperation mainly with the local cultural bodies and foundations, it managed to overcome this obstacle with the fewer losses possible, while at the same time it maintains its leading profile. Over the last few years, the globalization of the cultural market, the technological development, the provision of activities of mass entertainment, the ongoing financial crisis, as well as the saturation of the consumer audience by a series of platitudinous and ordinary cultural products, created a negative atmosphere for it, resulting in the felt reduction of its cultural activity today.

- *The at times applied supportive cultural state policy:* The Greek State undoubtedly plays a dominant role in the development of the cultural units, especially those of the local government, following a decentralized logic, with diverse

cultural products of local and domestic origin. Yet, regardless of the degree of their organizational connection with the state, these units cannot offer notable cultural products except when they have sufficient and mainly consistent financial resources (Kotler, Kotler, & Kotler, 2008; Sdrolias et al., 2014). Thus, among the various developmental laws, the state tries to support though the responsible for this aim services it has, the local cultural productive and entrepreneurial initiative, mostly on the level of the responsible bodies of Local Government.

The Ministry of Culture is the body that primarily applies funding policies and has the ability to proceed to a series of program contracts of cultural character. Consequently, DI.K.E.K depends directly on its will, planning and financial support. From 2002 and onwards DI.K.E.K itself proposes every year to the Ministry a concrete plan for the financing of a series of its cultural events. Yet, up to the present it managed to draw only small amounts because the Ministry of Culture follows a fragmentary policy of selective support towards specific cultural bodies, which happen to display the same ideological identity, having as a result that the evaluation of the various proposals and in effect their potential implementation is promoted or not respectively, without ignoring the possibility of some suspicious financial transaction between them (Tegos, 2008; Vouzas, 2012). Given the necessity for its financial support, state inability to respond to DI.K.E.K's reasonable requests, causes a clear degradation of the offered cultural product and in effect discourages the audience's participation in it.

- *The socio-cultural characteristics of the local area:* These characteristics are defined by the local culture and local community taking part in the cultural events. What is perceived as local culture is the cultural makeup of an area, consequence of the special geographical and climate conditions that the residents of this area experience over time, as well as of the unique mores and traditions that have gradually been developed. It also represents a special aesthetic cultivation, attributing to each region an individual profile (Paschalidis, 2002).

As far as the local community is concerned, the intensity of the Greek financial crisis signifies a strong disposition towards its transition from the real economy to the so-called "economy of symbols", which presents various cultural "signs" as its main product and which allows the community to acquire a specific brand name, and in effect economic benefits from not necessarily financial activities, such as the area's symbolic qualities, the material and immaterial elements of its fame, its legends and in general its cultural traditions (Abankina, 2013: 4). The given brand name guarantees the cultural authenticity of the provided cultural product and becomes a symbol of the "consumer" audience's trust in the quality and attractiveness of the area's cultural contribution.

In an effort to outline the cultural profile of the Prefecture of Karditsa, someone can realize that the area displays unique cultural interest, with diverse cultural associations and consequently a wide range of cultural activities, thus formulating for DI.K.E.K itself favorable conditions of action towards a cultural

audience qualitatively upgraded, quite experienced but also demanding, and possibly with increased disposition for a more fruitful participation, cooperation and communication with the previously mentioned cultural unit (Kakkou, 2009).

### 3.2.2 DI.K.E.K's Inner Environment

The cultural units are required to play a responsible role that will contribute to the maintenance and promotion of the cultural heritage, making their cultural products perceivable and widely accepted in such a way that they stimulate human thought and enrich the contemporary way of life. A basic prerequisite for the formulation of the appropriate atmosphere for the achievement of these goals is the inquisition of the main factors of the cultural unit's inner environment that act and are influenced by it. More specifically (Chambouri-Ioannidou, 2003):

- The specification and function of its structural characteristics: DI.K.E.K operates on the basis of a traditionally linear structure, where a strict hierarchical and functional track of thought dominates (Koutouzis, 1999; Mullins, 2007), with absolute unity of management and command, and a quite heavy administrative task, shouldered by its Management Director (Statutes Foundation of DI.K.E.K, 1990: 9) and in which—often without jurisdiction—the President of the Board of Directors intervenes, a fact that often causes organizational confusion. The close dependence upon the given Municipal Authority, whose representatives take the responsibility for the cultural events, their frequent lack of sufficient cultural education, along with the absence of cultural specialization of its middle and lower level officers, compose an organizational environment with bureaucratic features and waste of time concerning the final decision making and the realization of the given assigned cultural work.
- *The specification of the factors that constitute its organizational environment:* The way that the individuals act within an organization, is defined partly by human nature itself and partly by the dominant organizational atmosphere. The basic constituent parts of its atmosphere are the structure of the organization itself under the scope of the rules, functions, commands and controls, the style of management, that is the type of the formal and informal relationship which the manager adopts towards his/her personnel, the concentration or decentralization of the work and the various powers, the distribution of responsibilities, tolerance and conflict, the degree of communication among the personnel and its interest in their job, motives and rewards, as well as the working conditions that the employee experiences daily (Staehle, 2013; Zavlanos, 1991).

Since a significant relationship between the mood of the organization and its efficiency is often observed (Zavlanos, 1991: 104), the research of the above factors is considered to be necessary within the organizational setting of DI.K.E.K itself. This effort was confronted with the ab initio unwillingness of the human resources or even their denial to participate, mainly due to the fear of losing their jobs, in the prospect of completing questionnaires concerning the organizational

climate and agreed to provide only some informal references. This attitude is directly related to the fact that the cultural unit itself displays a closed organizational climate characterized by the adoption, primarily by the President of the Supervisory Board, of a stance of “expertise”, which forms a management style characterized by the maintenance of distance and formality, while on no occasion does the management express will to decentralize powers and its heavy overall work.

## 4 Research Approach

The aim of this research is to estimate the value of the total offered cultural work of DI.K.E.K, an estimation made by the audience itself. That is why special emphasis is given on the evaluation of the provided cultural product, of the form, process and level of cultural communication with this audience, given that these two fields constitute the main defining factors expressing its cultural dimension and cultural achievements in the town of Karditsa and its wider region. The final total research results-conclusions of the above two factors—can contribute to the development of a dynamic structural redesign so that the continuation of DI.K.E.K’s cultural work is enabled, yet on more innovative and efficient organizational functional and production foundation.

The methodological approach is made on the basis of an *Exploratory Study* and aims at the promotion of knowledge in issues of analytical and synthetic process of the structural design of Organizations (Kosiol, 1962), like DI.K.E.K, since the size and width of the fields under research create a situation for which—in terms of research—an empirical approach isn’t suggested, with hypotheses testing and in general with the strict features of a *Positivist Approach* (Welch, Piekari, Plakoyiannaki, & Paavilainen-Mäntymäki, 2011; Wildemuth, 1993). In these cases, for the detailed research and effective approach of the DI.K.E.K’s situation in total, the immediate specification of the various issues is recommended, as they are expressed by the results of the questionnaires and by the local references in general with the simultaneous support by data from the domestic and international bibliography.

### 4.1 Research Methodology

For the research, a questionnaire was used, which consists in essence of two parts. The first part refers to DI.K.E.K’s provided cultural product, while the second one refers to the extent of its cultural communication with its cultural audience. The questions were mainly scaled questions (the 7/grade Likert scale was used), while some of them were dichotomic and some others were multiple choice questions.

The distribution, completion and collection of the questionnaires took place from 14 to 22 March 2009.<sup>4</sup> 180 questionnaires were distributed in different times and places in Karditsa city and they were filled in by 142 persons, from whom nine questionnaires were incomplete. Therefore, the final sample of the fully completed questionnaires was 131. It was also found out that **Cronbach's  $\alpha$**  reliability coefficient of the scales used to measure the multifaceted notion of cultural product and cultural communication, was 0.958 and 0.879 respectively, higher than 0.700, which is the normal questionnaire reliability limit (Bishop, Finberg, & Holland, 2007; Hair, Black, Babin, & Anderson, 2010).

The process of data processing was carried out with the help of the statistic package SPSS20 (Howitt & Cramer, 2010) and particularly with the method of *descriptive statistics*, where its main tools were primarily used, namely Mean (**mean**), Standard Deviation (**Std. Devt.**), Frequencies (**Freq.**) and Cumulative Frequencies (**Cuml. Freq.**).

## 4.2 Research Results

### 4.2.1 Research Results Concerning DI.K.E.K's Cultural Communication

Cultural communication acts an organized activity that refers to a bipolar framework of a communicative relationship between the cultural unit on the one side and the cultural audience on the other, aiming not exclusively at promoting the cultural products to the audience, but mainly at creating a network of essential contact with it, including as many of its groups as possible (Athanasopoulou, 2003: 116). This kind of relationship is mutual and clearly interactive and refers to human wish to confront the individual cultural unit so as to find out its readiness and efficiency in producing and providing cultural products as well as the frequency and the means of providing them, which acts as a way to satisfy its cultural needs (Hein, 2006), while the unit itself seen as a "cultural agent" is expected to build a network of communication and message and information exchange with the audience, to search for the audience's cultural needs, for its awareness and willingness for a creative intervention through its ideas and suggestions on the designing, managerial and informative process of the cultural product (Athanasopoulou, 2003; Kastoras, 2002).

The process of cultural communication has to do with the fundamentally well known communicative model. The adaptation of such a model on the features of the communicative environment of DI.K.E.K and its detailed analysis was considered necessary for the specification of the relationship and the degree of its cultural

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<sup>4</sup>Data acquisition was carried out in the context of the dissertation thanks to a grant from GAJU 79/2013/S.

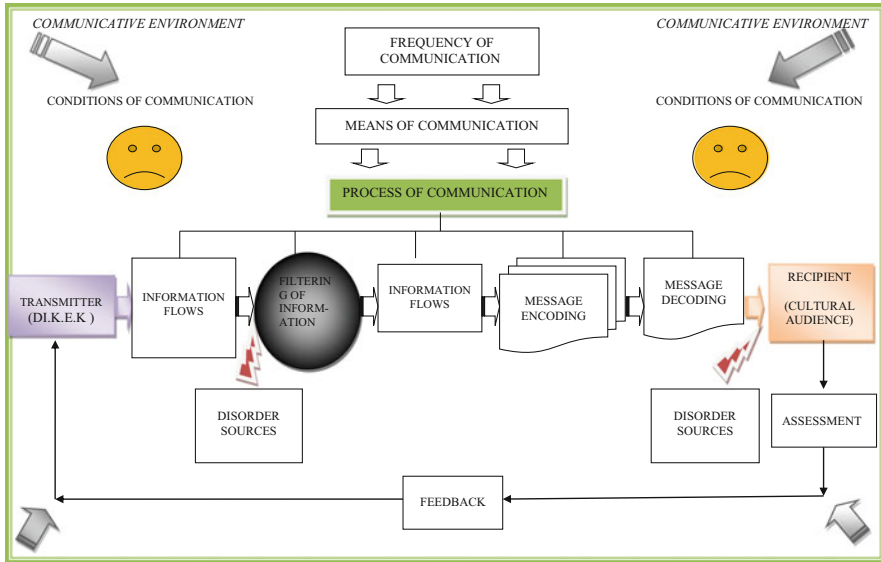


Fig. 2 DI.K.E.K.'s communicative model. Source: Own depiction

communication with its consumer audience. Based on the form of the fore mentioned model, someone can—through the analysis of the research results as well, draw the following conclusions (Fig. 2):

- The cultural communication of DI.K.E.K takes place in a framework mainly characterized by the quality of the involved parties, by the size, the quality and the value of the provided cultural product. The cultural environment, under the given at times predominant conditions, sustains and affects significantly this process. For the on the whole assessment of the level of the provided cultural communication, the most valid judge is the “consumer” audience itself, which takes parts in the process as the second agent of the communicative relationship. In the question to the audience “How do you evaluate, in total, the communication of DI.K.E.K with the consumer audience of the area in which it acts;”, the audience (n = 131) presented with its answers a “not so good communicative relationship”(mean = 3.15 and Std. Dev. = 1.389). Moreover, a significant percentage of the persons asked (Cuml. percent: 62.3 %) fluctuated in the span from “very bad” to “not so good communicative relationship”.
- In this communicative environment one of the basic agents, the transmitter, is DI.K.E.K itself as a cultural unit responsible for the specification not only of the current but also of the future ways of action on a cultural and social level, as well as of the communicative techniques for the transmission of its cultural products. What is researched however is from the one hand the extent to which during its effort, DI.K.E.K manages to measure the needs of the audience it addresses and from the other what is the final degree of satisfaction. Data collection is

discouraging and concordant with our personal initial presuppositions about DI.K.E.K as a communicatively introvert enterprise, since for the first part of the question concerning the frequency of collection of the audience's opinion about the kind of the cultural and social activities, the answer is "seldom" (mean = 1.69 and Std. Dev. = 1.215). Besides, a percentage of 64 % of the people asked, answered "never". For the second part of the question concerning the extent to which their cultural and social needs are met, the participants answered "partly" (mean = 3.16 and Std. Dev. = 1.429) with a significant Cuml. Freq. of 63.4 % spanning from "not at all" to "partly".

- Within the dominant communicative environmental conditions of the existing communicative model, it is necessary to determine both the communicative frequency and the communicative means. Of special interest is the degree of direct communication between DI.K.E.K and the cultural audience, the frequency of which actually appears very rare (usually every 2 years) and has the form of debriefing reports. Hence, the phenomenon of partial or total citizen disinterest in the administration's debriefing invitation is commonly observed.

Concerning the kind of the most usual communicative means used by DI.K.E.K for the promotion of the provided cultural and social products, the public, in a percentage of 83, 2 % answered, as expected, that the main communicative means are the local mass media and Internet (mostly the mass media with 55.7 %), and only a small part (16.8 %) attributed its getting informed to friends or other random incidents. What needs special attention, is the assessment, on the part of the audience, of DI.K.E.K's basic communicative means, as it was depicted by the 7/grade Likert scale. Its results were placed on low evaluation standards [the mean was 3.05 (in the case of internet), 3.62 (in the case of advertising posts in the local mass media), and slightly more positive 3.67 (brochures and posters)], while it revealed serious weakness as far as the level of a direct and personal approach is concerned [2.04 (phone call contact), 2.14 (open discussion) and 2.37 (questionnaire distribution)].

- In the process of promoting its information and messages, DI.K.E.K appears to have a relative quantity of flow concerning the current and future aims and actions. On the question about whether this cultural enterprise takes care of the promotion of its cultural and social activities, the result of the questions answered gave mean = 3.57, which presents an almost neutral estimation on the part of the audience. Even if we accept that the wide consumer audience doesn't always receive such messages, deliberately or not, this information becomes widely known and naturally causes reactions towards specific centers—receivers of those messages which act as disorder sources (e.g. minorities in the Municipal Council, local mass media, public placement of the Politicians etc.). As a result, in the cases of negative or hesitant attitude, some interferences arise which make its administration carry out a process of filtering the flowing messages, so that their volume is eliminated and focused on the most achievable and viable actions.
- The limited—reduced by filtering—information and message flows go through an encoding process, that is processing of their format and content so that DI.K.



E.K's messages alter the cultural audience's behavior (Fiske, 1992; Kastoras, 2002). At this point, a problem that is spotted concerns the processing of the messages addressed to the cultural audience which gave the choice "often" a higher percentage (26 %) compared to the other choices (mean = 4.89 namely, "not so rare" which moves towards the same direction), when asked to answer the question about how often it lacks information about cultural and social actions, not on its own fault, but due to mistakes and omissions of DI.K.E.K itself.

- The more or less successful message encoding affects through a chain reaction the decoding process, the level and quality of which is directly linked to a wide range of personal social and psychological factors (educational level, social status, favorable or not attitude towards the principal's political placement, financial status, professional activity, cultural refinement, culture, which as has already been stated, has deep roots, thus raising great expectations, etc.) which either predispose the audience positively towards the incoming messages, or contribute to its distancing itself from them, constituting another form of disorders source.
- In direct contrast to the communicative dipole is DI.K.E.K's cultural audience as a receiver of the former's cultural information and messages, which is also partly responsible for the communicative dimension concerning DI.K.E.K and mainly for the way it operates. The correct decoding of the received messages, the audience's positive or not response to them, along with the active participation in planning cultural actions, contributes both to information flow from the part of the receiver to the transmitter and the gentle function of the communicative process, which is disrupted and finally cancelled, when facing the cultural audience's unwillingness to participate and its distancing itself from the planning and the final creation of the cultural product. A relevant question to the public about the frequency of making recommendations concerning the cultural and social action they suggest, 57.3 % was answered negatively ("never") and only approximately 25 % of the persons asked showed a somehow active participation ("sometimes" 19.8 % and "often" 3.8 %).

A further obligation of DI.K.E.K's cultural audience is the reasoned assessment both of the various parts (e.g. message content, means and frequency of communication etc.) and the whole communicative process, so that it supplies the necessary informative material for the process of feedback, which will assist the adoption of remedial actions. This process is meaningful only if DI.K.E.K takes into consideration the cultural and social suggestions of its audience, and encourages the latter's participation, a factor contributing to the establishment of a participatory process. Through the two relevant questions, it was revealed that as far as the utilization of the suggestions is concerned, the audience gave answers between "disagree" and "rather disagree" (mean = 2.50 and Std. Dev. = 1.489), with high percentages (76.7 %) extending in the span from "strongly disagree" to "rather disagree", while with regard to the encouragement of suggestion making, the audience responded "rather disagree" (mean = 2.92 and Std. Dev. = 1.485) with an also high percentage (67.9 %) extending in the same span.

When completing the process of providing feedback, it is essential that DI.K.E.K itself inform the audience about the possibility and the degree to which the suggestions made are utilized, so that a basis for an ongoing brainstorming process is built, which if used—even partially—will benefit both parts, establishing an effective communicative relationship. In the relevant question however, the cultural audience stresses with a high percentage (61.8 %) the absence of a process of providing information, concerning the outcome of the recommended on its part cultural and social action.

### 4.2.2 Research Results Concerning DI.K.E.K’s Production Planning and Implementation

Like every cultural organization, when formulating its production circuit (Montana & Chamov, 1993), DI.K.E.K has to carry out a regular planning, which contributes effectively to drawing up plans concerning the finally produced cultural product (Fig. 3). The main parts of this planning include what will be produced and how it will be produced and how this product will be distributed. Later, the transformation of this planning into reality takes place on the basis of the production process, which consists of three individual phases:

- *Input Phase.* During this first phase, a series of immaterial and material elements enter the production process. In the particular case as immaterial elements are regarded the cultural experience, the cultural background, the audience’s

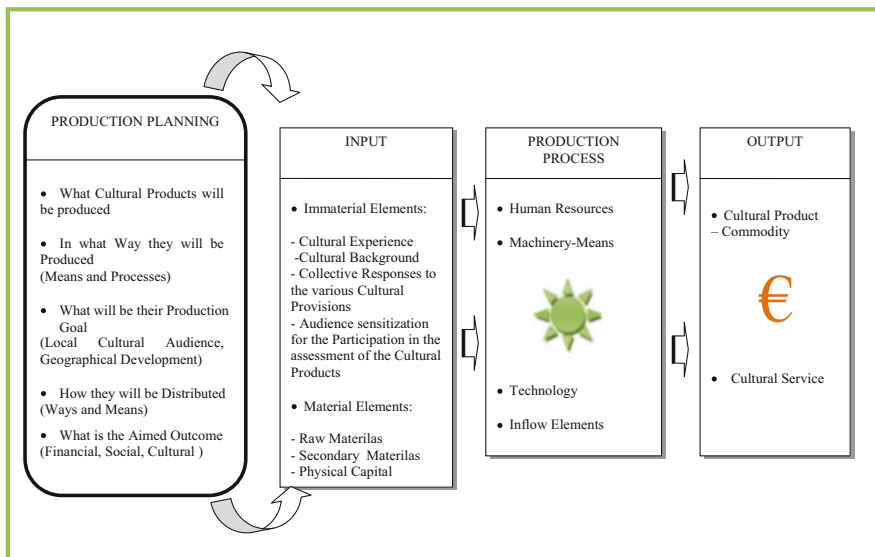


Fig. 3 DI.K.E.K’s production approach. Source: Own depiction

response to DI.K.E.K's cultural contribution up to now, and the degree of awareness of the consumer audience for its participation as the final evaluator (Makri, 2003: 58–61), whereas the material elements refer to the primary and secondary raw material necessary for the creation of the cultural goods. Possible inadequate input of such elements caused serious problems in the development of production. Nevertheless, through the research done on DI.K.E.K's consumer audience, a significant deficit was found out, concerning the utilization of some immaterial elements, the utilization of the significant cultural background of the area and the awareness for the participation of the consumer audience in the final formulation of the cultural product.

Concerning the first dimension, through the question "To what extent does DI.K.E.K make use of the local cultural heritage in its provided cultural goods", the consumer audience presented a degree of utilization which spans from 'a little' and 'relatively' (mean = 3.60 and Std. Dev. = 1.379). A significant percentage of the people asked (Cuml. percent: 77.1 %) was located in the span from 'not at all' to 'relatively'. As far as the second dimension is concerned, with regard to the supply on the part of DI.K.E.K of opportunities to the audience for assessing the former's cultural and social product, and the 'means for this assessment', the great majority of the audience (76.3 %) gave a negative response and only 23.7 % responded positively (from this percentage, 64.5 % was through leaflets, 25.8 % through the internet and 9.7 % through phone calls), which verifies the organization's inability to use important input for the formulation of the final cultural product.

- *Production Processing Phase.* During this phase, the input factors enter the place of production, where the available human resources, the equipment, the means and the technology interrelate in a production process aiming at producing the final product.
- *Output Phase.* In this final stage, the complete cultural product is available for use by the consumer public. With regard to the finally produced cultural product what is aimed at is the specification of the main factors which shape its quality on the one hand and determine its cultural value on the other. Mostly responsible for shaping the quality of the cultural product are the factors of the organization's inner and outer environment. Beyond a particular personal opinion expressed repeatedly about the problems observed during the research both in the inner and outer environment of DI.K.E.K and which have serious repercussions on the quality of its produced cultural and social product, the findings coming from the analysis of the relevant question clearly present a similar public opinion. Thus, when the people asked were invited to spot, through a wide factor listing 'the most important problems in providing products of high cultural and social value', they presented as main reasons the insufficient state and municipal funding (62.6 %), the close politically oriented dependence on the State and Local Government (59.5 %), the administration's weaknesses (56.5 %), the absence of strategy and goals on the part of the administration (55 %) and the administration's knowledge deficit (43.5 %)

According to these estimations particularly problematic seems to be the profile of the administration's qualitative features, which should be taken into serious consideration.

The main factors which determine the cultural value of the produced product were defined as follows:

- *Total assessment of the provided cultural work.* With the aim of gauging the total sense that the audience gets from DI.K.E.K's provided work, a specific Question was asked, in which the consumer audience presented through its answer a level of assessment spanning from 'not good' and 'neither good nor bad' (mean = 3.69 and Std. Dev. = 1.398), with the greater percentage (30.5 %) considering the provided work 'neither good nor bad'.
- *Individual evaluative characterizations of the provided cultural work.* It was considered essential that the level of the audience's approval or disapproval of the characterizations of DI.K.E.K's provided cultural work is researched, so that it can be realized how the public's reduced interest for DI.K.E.K's cultural actions is explained. So, in the relevant question the choices 'interesting', 'creative' and 'trivial' presented a "neutral" attitude, since the mean was about 4 (4.05–3.88–3.75 correspondingly), while the choices "subversive", "innovative" and "pointless" were about 3 (2.76–2.85–3.14 correspondingly), presenting an attitude of "rather disagree", thus confirming and explaining the existing problematic situation.
- *Assessment of the cultural and social contribution of DI.K.E.K's individual units and actions.* In order to be found out which of its actions has had a deep impact on the public's conscience as the most and least important for the cultural and social development of the area, the audience was asked to evaluate, through a question, a series of actions and designated as "important" by order of merit the Municipal Library (mean = 4.92 and Std. Dev. = 1.723), the two Municipal Cinemas (mean = 4.89 and Std. Dev. = 1.471), and the cultural events (mean = 4.82 and Std. deviation = 1.872). The lowest average of assessment was given to the Municipal Radio Station (mean = 3.23 and Std. Dev. = 1.906), the contribution of which ranged from "insignificant" and 'neither insignificant nor "significant"'.
- *Its cultural contribution as a whole.* Given the contribution of the cultural organizations to the reinforcement of social bonds, to urban revival, to upgrading the cultural level and to the formulation of a recognizable identity of their area, as well as to the area's touristic and financial development (Grodach & Loukaitou-Sideris, 2007; Lord, 2008: 6–7), it was considered necessary to research the extent to which the audience estimates that DI.K.E.K, during its long existence, offers similar services to an area in great need of such competitive advantages, so that it can confront the special emphasis given by the State on the financial and business development of important neighboring urban centers, like Larissa and Volos, at least as it is noted down by the local printed media. Therefore, when the participants were asked to pinpoint the degree of their approval or disapproval of the various categories of contribution to the

town and its region, their estimations were designated by the response “neutrally” with a slightly bigger preference given to “stressing cultural significance” (mean = 3.95 and Std. Dev. = 1.762), as well as to the touristic development of the town and the surrounding area (mean = 3.92 and Std. Dev. = 1.897).

- *Assessment of DI.K.E.K's future contribution.* This particular point was considered indispensable, since the possible estimation that DI.K.E.K, under its current organizational status, can offer in the future products of high cultural and social value, from the one hand contributes to management complacency, and from the other, encourages it to continue its work properly and to make plans for future action. The opposite estimation—which of course matches our personal, often stated opinion—, would lead DI.K.E.K, to skepticism, self-criticism, initiative taking, aiming at the necessary corrective movements. On the basis of the question relevant to the issue of DI.K.E.K's future direction of its cultural and social work, the audience advocated in favor of the second estimation, displaying a reserved attitude (mean = 3.24 and Std. Dev. = 1.533), oriented towards “rather disagree”. Moreover, the fact that a percentage near 80 % spanned from “totally disagree” to “neither agree nor disagree” is noteworthy.

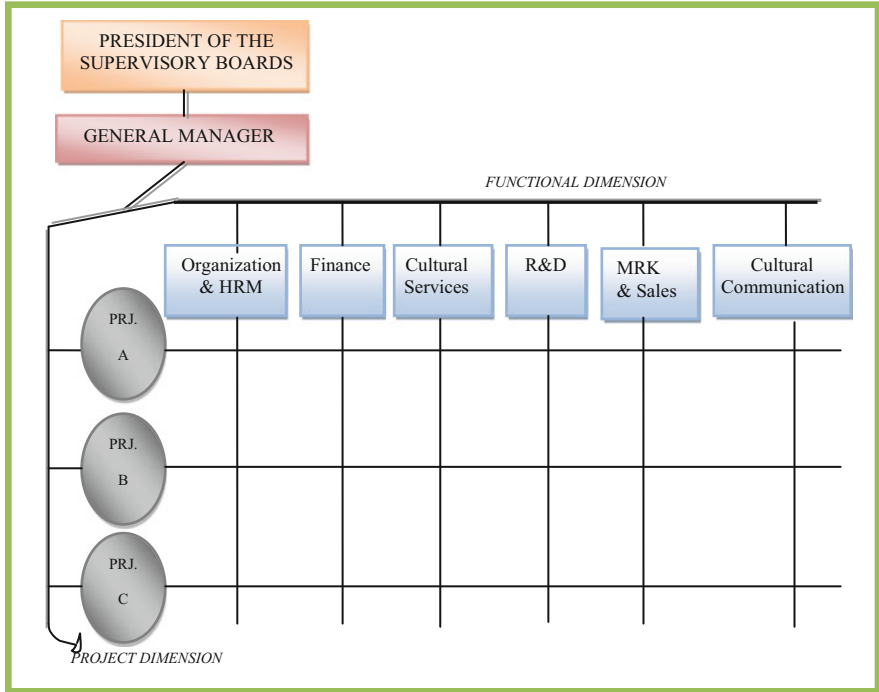
## 5 Suggestions and Process of DI.K.E.K's Restructuring, Through the Achievement of a New Dynamic Organizational Structure

According to the up to now theoretical and research approaches, DI.K.E.K should proceed to a structural redesign displaying the following features (Fig. 4):

### 5.1 *Organizational and Functional Independence*

To avoid a problematic developmental course it is suggested that DI.K.E.K function as an **Institution of Urban Cultural Collectivity**. The institutions of this kind are neither exclusively corporate, nor purely governmental, but their actions are directly subjected to the various social networks' judgment. Their main features are (Rentschler & Reussner, 2002; Lord, 2008: 4–5):

- The institution's management doesn't come from a central governmental scheme or municipal authority, but consists of independent or semi-independent Supervisory Boards. This deters its dependence upon each state or municipal authority, while allowing its management to determine its schemes and future orientations itself.
- The benefits from an upgraded role of the General Director, shouldn't be restricted to his/her ability to draw capital and align with the established cultural policies, but should develop activities that will serve the social responsibility and



**Fig. 4** DI.K.E.K's structural redesign on the basis of the matrix organization. *Source:* Own depiction

accountability of the cultural institution he is in charge of, increasing access to it, not only through an increase in the number of visitors, but also through its audience's communicative inquisition.

- Is able to resort to multiple financing sources, including the state, the municipalities, the visitors, donors and sponsors, etc., thus ensuring an upgraded quality for its cultural goods.
- Is subject to constant financial controls, either from the state or from independent Greek control mechanisms, demanded by the involved bodies, social networks and the consumer cultural audience.
- Displays a significant degree of extroversion, since it has strong bonds with the local and wider community, while pursuing their cultural cooperation too.

## 5.2 Limitation of the Organizational and Operational Work

As already mentioned, the content and complexity of DI.K.E.K's tasks, triggered from the beginning a need for a new structural re-approach and for its restriction to

clearly cultural actions. The management's work will be thus significantly mitigated, which will contribute to a more focused design and planning of the cultural actions. Discharged from the confusion caused by the given plethora of these uneven activities and the dispersion of its powers towards different directions, a greater uniformity in policies, practices and processes will automatically emerge, while there will also be a narrower spectrum of dispersion of its limited funds and therefore less anxiety for the management, caused by the consistent threat of insufficient funding.

Moreover, decision-making will be more rapid and indeed in issues satisfying more sufficiently the local cultural conditions and needs. Finally, a greater specialization of the functional parts and their employed staff will be achieved, resulting in the expected maximization of their efficiency. In general, it is estimated that a greater prospect for the development of DI.K.E.K's cultural actions will come out as well as production of products with higher cultural value.

### 5.3 *Appearance of an Innovative Organizational Scheme*

To this direction contributed DI.K.E.K's operation based on Matrix Organization (Burke, 2013). This organization is characterized by two main dimensions. The *Functional Dimension* (namely the dimension including the main new-formulated Management—Functions and represents their responsibility and power), and the *Project Dimension*, which as an executive process emphasizes particular each time cultural activities and represents the projects' responsibility and power. The main advantage of the Matrix Organization is the abbreviation of the communication routes between the Project Teams and the Functional Management, which overcomes time-consuming hierarchical report processes, and creates a constant flow of support to the various projects from the specific functional actions they need (Burke, 2013).

As far as the *Project Teams* are concerned, they will consist of the head of the project and of specialized members coming from its various functional parts, or of members belonging to the *project teams* permanently. Necessarily though, some external members-counselors on art and culture will also take part, who will provide the needed knowledge and experience, while they should also be able to often revive their ingenuity and search for solutions that will bring DI.K.E.K to a closer contact with those requiring cultural goods of high quality and value.

The linking device between the two dimensions is the President and the General Director, both of whom should have (Economou, 2003; Kotler et al., 2008; Kotter, 1996; Lysgard, 2012; Varbanova, 2013; Tzivakou, 2008):

- Multifaceted social skills so that they are interested not only in DI.K.E.K's issues, but also in the wider social audience's social values.
- A communicative gift able to encourage others, beyond its consistent audience, to participate and develop as teams or communities around its cultural work.

- Leading intuition, analytical and synthetic ability and financial management experience so as to do “what is correct” and also “do it correctly”.
- Experience in designing, planning, and creating innovative cultural works and activities.
- Developed ability to perceive imminent environmental changes and to transmit the vision of a change to its available staff.
- Will for developing co-operations with the corresponding cultural local or regional organizations and diffusion of the acquired knowledge.
- Ability to develop cultural tourism as a prominent strategy for the promotion of the cultural value and contribution of the local areas, through the consistent attraction of foreign visitors.
- Mentality that advocates the development of cultural creativity by attracting and utilizing “creative” people who are able to contribute significantly to the revival or even the development of new cultural products.

#### ***5.4 Improvement of the Organizational Atmosphere***

An appropriately structured Directorate of Organization and Personnel combined with the President’s and DI.K.E.K’s General Director’s disposition for a complete change in the organization’s atmosphere, are the main factors for the improvement of the working conditions and in effect of the employees’ efficiency. The new organizational atmosphere should be characterized from (Kotter, 1996; Tzivakou, 2008):

- Change in the management’s attitude and implementation of the “open-gate” policy, towards a potential wish of an employee to express directly to the Senior Management complaints and concerns about the behavior of his immediate superiors.
- Achievement of more concrete working relationships and introduction of processes of staff motivation, characterized by working satisfaction, recognition, initiative, and participation.
- Improvement of interpersonal relationships and support of the intra-communication process.
- Ongoing training and personnel evolution on merit-based criteria of efficiency.
- Frequent job rotation to avoid routine and work overburdening, and finally
- Ongoing personnel information update about the course of the organizational change.



### ***5.5 Development of Appropriate Mechanisms for Collection of Information***

DI.K.E.K needs continuous information flow about the audience's changing desires, the competitors' new initiatives, and the challenges of the cultural market in general, which renders necessary the need for the creation and management of an effective information system. It is a net of factors, consisting of individuals, technological equipment and processes that gather, classify, assess and distribute valid and precise information to the members of this cultural unit (Bozinis, 2007; Priporas, 2004).

The particular information system should detect, organize and make good use of the various information sources (e.g. available files concerning the competitors' course, short-term and long-term predictions about the political setting, indicators of analysis of the market's share, various information sheet, brochures, handouts) on a diachronic and synchronic level, so that the continuous informing about the most interesting developments and demands of DI.K.E.K.'s cultural surroundings is ensured.

## **6 Conclusion**

In order for DI.K.E.K to manage to meet the demands of the contemporary cultural environment, it is essential that its unique local profile be promoted along with the adoption of focused directions of political action that will support it decisively in overcoming the organizational and production difficulties, and in securing a continuous flow and production of cultural work of high level. This way, it is able to apply an effective process of meeting the local—and not alone—cultural needs, while through the maintenance of an atmosphere of harmonious cooperation with the corresponding local cultural bodies, the audience's trust and accordingly its participation in the various cultural events will be reinforced.

The present paper, for the best research approach possible towards DI.K.E.K, was based on domestic and international bibliographic sources, with an emphasis on dominant factors such as that of the cultural product and cultural communication, aiming at the greatest contribution and prospect for its restructuring possible, on the use of questionnaires to its consumer cultural audience, on the minimum informal interviews with its personnel, and on the views of various parts involved in its function, as expressed through the local media and the internet.

Based on the final conclusions, the whole reorganization process ought to include a new dynamic structural redesign according to Matrix Organization, which will contribute to its organizational independence, so that it functions as a **Cultural Organization of Urban Collectivity**, able to restrict the range of its generative work to actions clearly cultural. It will thus improve its organizational atmosphere, the working conditions will be purged and the employees'

performance level will be raised. It will also manage to introduce a new strategy of a communicative approach to its cultural audience, while the promotion of a productive and competitive strategy will become feasible, through appropriate mechanisms for information collection.

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# Cultural Tourism Revisited: The Case of Thessaly

Labros Vasiliadis, Panagiotis Trivellas, Dimitrios Belias, John Meleas, Dimitrios Kyriakou, and Athanasios Koustelios

**Abstract** Tourism is a socio-economic phenomenon with important effects on human life and national economies of the states. The journey, i.e. the movement of man from the place of permanent residence in another place, is the key element of tourism. Alongside main ingredient is the incentive for vacations and recreation, a fundamental right of all people.

As with other Greek destinations with a heavy reliance on a basic sun, sea and sand tourism model, Thessaly region is busy trying to diversify its tourism product. Cultural tourism is seen as one important means of achieving diversification.

Nowadays, new cultural tourism is focused on the integration of production and consumption, and it creates linkages between suppliers and consumers. Instead of passive consumption, cultural tourists demonstrate a proactive approach to meeting their needs, wanting to actively participate in experiences while travelling. On the other side, suppliers focus their attention on the close interaction with consumers and co-creation of high quality experiences.

This study will try to, synthesize and present all the principal cultural resources that exist and remain unexploited in the region of Thessaly as well as—in the end—will propose a strategic plan of cultural tourism promotion even in times of economic crisis.

**Keywords** Cultural tourism • Regional development • Tourism product • Alternative tourism • Thessaly

**JEL Classification** F63 • M31 • M37 • O10 • R11 • R58 • Z10

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# 1 Introduction

Tourism is a global social-economic phenomenon which is based on the human need for pleasure, for contact with nature and for getting to know foreign places and cultures. The expansion of tourism has been the result of many factors such as rising living standards, improved transport, rising incomes and leisure time and the 'industrialization' of tourism production (Pavlogeorgatos, 2003).

Additionally, in recent years it looms more and more the argument of economic efficiency of regional heritage associated mainly with the development of tourism (Greffe, 2003; Mazzanti, 2003; Navrud & Ready, 2002), particularly cultural tourism that is well established in activity with a distinctive character and a growing popularity. This development is not unrelated to the observed shift of tourist demand for new tourism products that offer quality, distinctiveness, authenticity and new experiences to discerning tourists with special expectations. As part of these changes the preference for new less established tourism destinations is included.

Nowadays, new cultural tourism is focused on the integration of production and consumption, and increasing linkages between suppliers and consumers. Instead of passive consumption, cultural tourists demonstrate a proactive approach to meeting their needs, wanting to actively participate in creating experiences while travelling. On the other side, suppliers focus their attention on the close interaction and intimacy with consumers aiming at the co-creation of high quality experiences

Tourism industry contributed to Greek economy substantially in terms of GDP growth (i.e., 16.3 % in 2002) and employment (14.4 % of total employment, directly related jobs) (Dessylla, 2004). Greece based its tourism development mainly on mass-market models and included the popular sun-sea-sand destinations view (Polyzos & Sdrolias, 2006). However, this model is rather outdated and changes are needed. Hence, Greece started to evaluate its current tourism model, tourist activities and the need of alternative forms of tourism. Out of this evaluation, the following several weaknesses emerged (ELKE: The Hellenic Center for Investment): (i) High seasonality and high density in peak seasons, (ii) Dominance of mass tourism, (iii) Lack of thematic and alternative forms of tourism, (iv) Unhealthy public infrastructure. On the contrary, the following strengths existed within the Greek tourism (ELKE: The Hellenic Center for Investment): (i) The increase in the number of tourist arrivals; (ii) Diverse natural beauty; (iii) Cultural and historical heritage; and (iv) Vibrant folklore and Greek way of life (Kouri, 2012).

As aforementioned it is Greek destinations which have a heavy reliance on a basic sun, sea and sand tourism approach. Hence, Thessaly region is busy trying to diversify its tourism product. Cultural tourism is seen as one important means of achieving diversification.

## 2 Cultural Tourism: Conceptual Determination and Effects

Bradford, Gary, and Wallach (2000: 339) state that: Culture, understood as the values, worldviews, and identities that people construct for themselves, plays a major role in world events. Culture affects the coherence and viability of nations. This is not the ‘culture’ of high society, the elite arts, or the commercial media. Rather it is the culture of ordinary people as expressed in daily life, on special occasions, and in trying times. Culture has emerged as a topic of public concern and political action. If culture is politicised, so then is cultural tourism. As stated by Lanfant (1995: 4): tourism, particularly ‘cultural tourism’, is often considered by international organisations as a pedagogic instrument allowing new identities to emerge—identities corresponding to the new plural-ethnic or plural-state configurations which are forming.

Key priorities of the modern state tourism policy at international level, is the enrichment of the tourist product with new alternative forms of tourism, besides the dominant model of mass tourism (Christou, 2012). All countries, which are important tourist destinations, in order to increase their attractiveness, use all available means to contribute to this aim. Undoubtedly, cultural tourism is of great importance and efficiency for the global tourism evolution.

Although, a fairly large number of definitions is given for cultural tourism, there is no consensus to a universally accepted one. The most widely accepted definition, is the one introduced by World Tourism Organization (WTO, 1985), which has large amplitude and defines cultural tourism as “movement predominantly for cultural purposes” movements which include “educational tours, visits to festivals and other cultural events, visits to historic sites and monuments, travel to study nature, art and popular culture, and religious shrines”. Moreover, broad is the definition given by the International Council of Monuments and Sites (ICOMOS, 1999), featuring as cultural tourism “any activity that allows visitors to experience different lifestyles discovering other people, allowing them to experience the customs, traditions the natural environment and their ideas and have access to places of architectural, historical and archaeological interest or other cultural value”.

Additionally, it is a phenomenon that relies on motivation and perception of tourists despite the special features of the landscape. Cultural tourism is a subset of tourism in which the main motivation for visiting a site is based on cultural characteristics of the place but according to the perception of the cultural paradigm that has the tourist for himself (Poria, Butler, & Airey, 2001). Is tourism that is created, offered and consumed exactly as cultural recognition and appreciation in the form of acquisition of experience or knowledge (Prentice, 2001). It is a special form of tourism based on nostalgia and the desire of various cultural landscapes acquiring experience (Zepper & Hall, 1992).

A simpler, thus easier, definition, today most often used is the one who has given the known Organization for Education in Tourism and Leisure ATLAS (Richards,



1996), which includes in cultural tourism “all movements of people away from their usual place of residence in specific cultural attractions, such as sites of cultural heritage, artistic and cultural events, arts and theater”.

However, regardless of the definition adopted by anyone, the fact is that cultural tourism is mainly associated with the concepts of cultural heritage and general cultural resources which include archaeological and historic sites and monuments, museums of all kinds, the built environment (buildings architectural or historic interest, traditional settlements, etc.), and elements of modern culture of societies living in tourist destinations (festivals, visual and perform ingrates, popular culture) (Andriotis, 2009; Venetsanopoulou, 2006).

The impacts on redefining cultural tourism are quite significant (Dobrica, 2014). Given that the view of culture as almost everything that we are and everything we do is problematic, unless we differentiate between the activities included, we present the following comprehensive typology of cultural tourism elements:

- Heritage sites (e.g. archaeological sites, whole towns, monuments, museums).
- Performing arts venues (e.g. theatres, concert halls, cultural centers).
- Visual arts (e.g. galleries, sculpture parks, photography museums, architecture).
- Festivals and special events (e.g. music festivals, sporting events, carnivals).
- Religious sites (e.g. cathedrals, temples, pilgrimage destinations, spiritual retreats).
- Rural environments (e.g. villages, farms, national parks, ecomuseums).
- Indigenous communities and traditions (e.g. tribal people, ethnic groups, minority cultures).
- Arts and crafts (e.g. textiles, pottery, painting, sculpture).
- Language (e.g. learning or practice).
- Gastronomy (e.g. wine tasting, food sampling, cookery courses).
- Industry and commerce (e.g. factory visits, mines, breweries and distilleries, canal trips).
- Modern popular culture (e.g. pop music, shopping, fashion, media, design, technology).
- Special interest activities (e.g. painting, photography, weaving).

The profiles of tourists—who engage in these different forms of cultural tourism—are likely to be quite diverse, in many ways. It is therefore interesting to consider how far the differentiation of the cultural tourism product is a significant consideration in commercial terms (Gholipour & Tajaddini, 2014). As stated by Edensor (2001: 59), ‘Typologies can identify regularities, but should be conceived as describing different tourist practice rather than types of people, as roles adopted rather than social categories made manifest.’ Expanding on his concept of role-playing, Seaton (2002) suggests that transient rather than fixed typologies should be used as a way of perceiving tourist motivation. He suggests a number of personae that might be adopted or emulated by the tourist. Those that are most appropriate to the cultural tourist might include:

- *The dilettante/aesthete*: origins with the European Grand Tourist visiting museums, galleries, and other cultural sites and landscapes.
- *The antiquarian heritage seeker*: particularly interested in the classical past, history and archaeology.
- *The explorer-adventurer*: influenced by the development of mountaineering, hiking, trekking and backpacking.
- *The religious pilgrim and spiritual seeker*: visitors to pilgrimage destinations, and in particular Western tourists seeking spiritual enlightenment through Eastern religions.
- *The festival charivariist*: attraction to festivals or ‘fests’ which allow a certain degree of escapism and lack of constraint.
- *The litterateur*: interested in the homes and landscapes of literary figures.
- *The epicurean*: a bon viveur, gastronome or wine buff.
- *The natural and social scientist*: an interest in rural heritage or an ecotourist (Adapted from Seaton, 2002).

The main benefits of cultural tourism are the following (Spilanis, 2000; Tsartas, 2003):

- It protects highlights and exploits the cultural resources and the general characteristics of the area where it grows.
- It is independent of seasonality, as it is not affected almost from all climatic conditions. Therefore, this helps to extend the tourist season, beyond peak season.
- It widely disseminates tourist stream to the emergence of new destinations in less developed areas.
- It attracts tourists with higher income and educational level, which usually extend their stay in a particular place and participate in more activities.
- It is friendly to the natural environment facilitating sustainable development, as opposed to mass tourism, which causes degradation and deterioration of the environment.
- It creates new job opportunities for skilled workers.
- It is one of the main instruments of modern strategy to revitalize urban centers through culture (culture-led urban regeneration).

### **3 Current Status: The Main Cultural Resources of the Region of Thessaly**

The Thessaly region has a large number of valuable cultural resources of all types and eras that can be categorized as follows:

- Sites and monuments of antiquity. This category includes archaeological sites and monuments (cities, temples, tombs) in prehistoric and historic times to the Roman era.

- Byzantine Monuments. The classification and monuments of the early Christian era.
- Medieval monuments.
- Traditional villages—neoclassical buildings. This category includes two subcategories:
  - traditional villages found throughout the region of Thessaly, with particular characteristics,
  - buildings (public and private) of neoclassical style.
- Buildings, sites and museums of the industrial heritage. Residues of industrial or pre-industrial technological development (inactive industrial plants, mines, ship-yards, etc.).
- Religious pilgrimages. Includes dozens of churches and monasteries.
- Museums—Collections. Includes public, municipal and private museums and collections (archaeological, historical, folklore, art, religious, industrial, etc.). From the Museums perspective the majority are archaeological. Of particular interest are some Special Theme Museums.

Events—Festivals. Among dozens of local summer festivals, certain identified that both in terms of organization and in terms of content and artistic sectors develop including their visibility in print and electronic media can be described as trans-local scope and innovative character.

## 4 Discussion

In the previous section, the abundance of cultural resources available to the Region of Thessaly was observed. The aim, as stated at the beginning of this study, is that after the recognition of the existence of this multitude of cultural resources, which indicative proposal could be recommended to further highlight these and attract tourists throughout the year either inbound or outbound, substantially reducing seasonality. For this purpose, some suggestions could be grouped into three main areas (Konsola, 2006):

*Area 1. Promotion of cultural resources using new technologies (Information Centers Visitor Centers virtual representation, Innovative Museums).*

The creation and operation of a Visitor Centre in each of the sections of the Thessaly region it is suggested, through which analytical, detailed and specific information to visitors about attractions, events and tourist facilities of the whole region will be provided. Particular emphasis will be given to the promotion of alternative tourism destinations (e.g. rural tourism, religious, cultural, conference, diving tourism, etc.). The information will be provided in various ways (brochures, maps, CD and DVD, projections, touch screens, video walls, etc.) and will be available via the Internet. Each center should include at least three

areas, the reception hall with the souvenir shop, an exhibition space with modern technological applications and a refreshment kiosk.

Taking advantage of the huge potential of new technologies, creation of Visual representation centers in order to raise significant archaeological and historical sites, the history of a city, an island or larger geographical unit etc. so interesting, easily understandable and entertaining, but also scientifically documented (Bounia, Nikonanou, & Oikonomou, 2008). The planned facilities using three-dimensional video projections, animation and other techniques to create an integrated virtual environment, such as a historic event (battle, siege, etc.) or a reconstructed ancient monument or a medieval castle through which frequently takes the participation and involvement of the visitor. Except the materialistic creation of these representation centers from which an indicative proposal may bear in mind that e-visual representation centers could be created in parallel offering multiple views and creating a promising view of a potential in person travel into the area.

Both centers proposed could be accommodated in existing facilities to be offered by the municipalities, the Region or other entities. The building must comply with the specifications as dictated by both the content of applications, and the requirements of the necessary technical equipment (hardware).

Finally, a new and alternative form of projection is the Innovative Museums (Smith, 2003). These museums can be called innovative because they have very little conventional exhibits and focus on digital displays. Such a museum needs to have space for the permanent exhibition and educational programs as well as the usual museum reception rooms and services to visitors and offices. The dimensions of the exhibition space shall be designed to develop multi-level functions of the museum, which will meet the goals and will facilitate the use of sophisticated high-tech instruments.

#### *Area 2. Creating Cultural Networks (Thematic Cultural Routes, Museums Networks).*

The cultural routes are particularly suited as a tool for knowledge and promotion of monuments, sites and museums, which are often unknown to the interested public audience (Apostolopoulos & Sdrali, 2009). Their inclusion in a proposed route along with other important and known cultural resources with high traffic provides the opportunity to gain visibility and attract visitors. Prerequisite of the courses is to be accessible, are in a relatively good state of preservation and are adequately signposted. Another suggested option in order to attract tourists would be the upload of an indicative video of the relevant route online.

The number of remarkable museums of the Region that could be involved in a network is large. Additionally, because in some areas there are several important museums and in order to participate in the network there are certain prerequisites, such as adequate facilities, the modern way of presentation of exhibits, and the existence of certain basic infrastructure to serve the public and printed material as well. The Network may take actions to improve the operation of museums, enhance their visibility and increase their traffic (Moulin & Boniface,

2001). Such actions include, for example issuing a brief guide that will bring out all the museums of the Network by categories, with some basic information about the content, opening hours etc. The material collected can be accessed via the Internet, to better serve tourists, as most museums in the region either do not have a website or a website available is insufficient.

*Area 3. Enhancing contemporary cultural creation actions (Major Events—Festivals).*

Some of the festivals in the regions of Thessaly have the potential to develop into events with particular resonance. By organizing them on a regular basis, their expansion, their orientation to a specific topic, the conclusion of international cooperation, the use of alternative spaces for events, and with the appropriate publicity in Greece and abroad, may be altered into institutions of international status and prestige.

Moving forward, it could be mentioned that parts of the proposed areas of action could be presented on social media and could be inserted into mobile applications that send notifications when a visitor crosses through the region or even when lands into an airport of the region or even download them as an electronic get-to-know game when visiting the relevant multi-tasking websites taking advantage of the new technological era. Agreements and special arrangements should also be made not only with foreign tourist operators with the usual meetings in tourism exhibitions but also with relevant bodies (private and public) in order to promote this alternative way of tourism in a more practical way.

Ending, it should be underlined and mentioned that regarding the implementation and operation institutions, may be for local business projects the municipality and in cooperation with other relevant bodies (e.g. the Archaeological Service of the General Secretariat of Culture) and, for larger scale projects the Region of Thessaly and the municipality could be carried out in collaboration with other relevant bodies. The financing of the proposed project is part of the public investment budgets of the municipalities and the Region, whose revenues derived from national and EU funds, under support of the Structural Funds to the country.

## 5 Conclusion

During the 1990s, cultural tourism was identified as one of the major future growth areas in Europe (Zepper & Hall, 1992). The WTO (1993) estimated that 37 % of all international trips would have a cultural element, and that this figure would increase annually by 15 % to the end of the century. Of course, in its broadest sense, cultural tourism cannot be considered to be a niche form of tourism at all.

During the same period an increasing emphasis has been placed on alternative tourism, the interest of which is focused on the protection of natural and cultural environment, in an effort to solve the problems of mass tourism

(i.e. low wages, seasonal employment, environmental degradation) (McKercher & du Cross, 2002).

Cultural tourism constitutes an alternative strategy of sustainable local development for improving quality of life. The main objective of this type of tourism is to transform the regions, which are characterized by cultural resources, into ideal places for vacation, residence or business.

Cultural tourism brings benefits to the host communities and provides an important motive for them to care for and maintain their heritage and cultural practices. It is an alternative tourism strategy with economic, social, cultural, educational and ecological dimensions, aiming at the sustainable local development.

The impacts of cultural tourism can clearly be major, especially as it could now be considered a growth industry rather than a minority pursuit. As discussed, the diversity of cultural tourism activities can give rise to a number of diverse impacts. It is evident that the impacts of tourism will always be most significant in those areas of the world that are particularly remote, fragile or unaccustomed to tourism.

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# “The Cultural Landscape of the Alentejo Pyrite”: What’s Next?

Marta Duarte Oliveira and Jorge Tavares Ribeiro

**Abstract** In Portugal, the recognition of “Cultural Landscapes” is due to the UNESCO category. Many of the local and regional initiatives aims this classification, which are majority disregarded due to unfulfilled and thus abandoned, resulting in lost opportunities. Understanding the territory as a rhizome in which architectural heritage is the catalysing element, despite its density or its expectant value, is the research’s core.

Taking as premise the European and North American proposals and projects of Cultural Landscapes that revitalized ancient industrial areas and their role within a new international paradigm of territorial development and planning, the research was developed from four Alentejo mining sites—Lousal, Aljustrel, S. Domingos and Pomarão—which embody the proposal of the Cultural Landscape of the Alentejo Pyrite. From the common and specific analysis of evolutionary, geographical, urban, architectural and heritage contexts, it is presented the structural, classifying and compositional synthesis of the public, semi-public and dwelling spaces, which underlie the proposal’s contexture. This paper reflects upon the future of this body of work from the academic scope to being operative in the public planning sphere and regional/local interventions.

**Keywords** Cultural landscapes • Mining architectural heritage • Alentejo region

**JEL Classification** N54 or O21 or R58

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## 1 Introduction

This paper results from a PhD research, which had as premise the territorial understanding of heritage towards a prospective view, regarding the particular context of Portugal.

The proposal of “The Cultural Landscape of the Alentejo Pyrite” revolves around four mining sites—Lousal, Aljustrel, S.Domingos and Pomarão (see Fig. 1).

It promotes the need to change the current paradigm within the Portuguese scope, regarding not only the definition of heritage but preservation and planning tools as well: “In the national (Portuguese) scope, the recognition of cultural landscape as a concept is due to UNESCO (1972) classification of some portuguese landscapes, namely Sintra (1995), Alto Douro Wine Region (2001) and the Landscape of the Pico Island Vineyard (2004). In fact and despite that when compared to other international experiences previously mentioned, other territorial project such as Portugal Historic Villages (1994/5-2002), Xisto [Schist] Villages (2001–2006) and the Patrimonial Park of Mondego River (2007–) can be acknowledged as cultural landscapes proposals—the national (Portuguese) paradigm—for international visibility or ecomical and political reasons, is practically centered on UNESCO experiences. Many of the local and regional initiatives ambition is this classification, which generally is not obtained for unfullfilled singularity requirement, resulting in lost opportunities (as happened to an application related to the proposal that this paper concerns)” (Oliveira & Ribeiro, 2014).

## 2 Literature Review

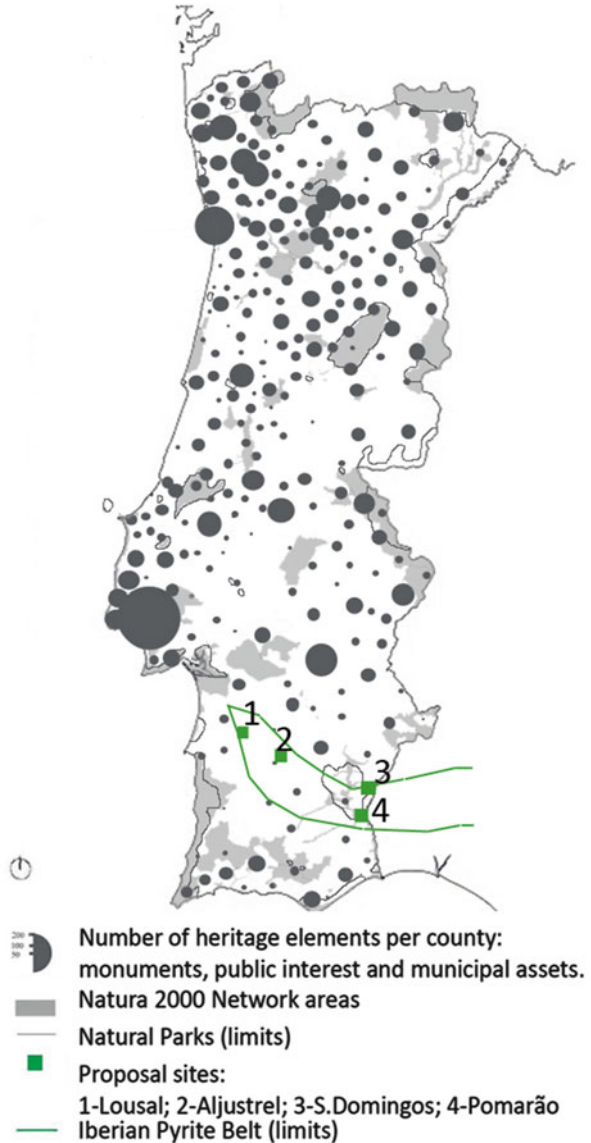
The previous considerations are slightly addressed on recent institutional documents (MAOTDR, 2007; MAOTE, 2014), but because of their generic nature, there is still a methodology urgency, which the proposal aimed to address and convey from the beginning. Also, the fact that the mining cultural landscapes have been almost confined to the domain of other disciplinary scopes, namely geological (Matos et al., 2010) environmental (DGEG & EDM, 2011) and sociological (Alves, 1992, 1997; Alves & Martins, 2005; Rodrigues, 2005, 2013), rather than architectural or urban with the noted exception of Carvalho (2009), makes this work an example of a new voice of understanding.

## 3 Methodology

Due to concision issues, this paper and work research is structured as followed:

- Context: presentation of the mining sites regarding its common identity, which is based not only in sociological and geological aspects, but as supported by the

**Fig. 1** Classified Portuguese Heritage (built and natural) continental map: geographic localization of the cultural landscape proposal and respective mining sites. Author: M.D. Oliveira from MAOTDR, 2007 and ICNB 2010



research and respective morphological analysis, structural and compositional synthesis main considerations;

- Global synthesis of the proposal and respective methodology, which can be valid for other similar proposals and are presented as a part of the results of the research;
- And finally, the conclusions that are more remarks on what is the future for the proposal.

### **3.1 Context**

Lousal, Aljustrel and S.Domingos/Pomarão have a common geological origin, the Iberian Pyrite Belt (see Fig. 1) which has an extension of 250 km and approximately 30–60 km wide, from the north of Grândola (Portugal) and the nearby Seville (Spain). Despite the existence of this common geological “cord”—which was defined as “non apparent structured area” (Oliveira & Ribeiro, 2014) related to natural conditioning elements, that as the name indicates, are not visible to the naked eye and yet influence the design, amongst others, of different types of territorial proposals as studied—there are other proximity factors between the sites such as paternalist ideals or the toponymy.

The introduction of paternalism occurred on different stages for the mining sites in discussion as they have different dates of origin and terminus (S. Domingos/Pomarão, from 1858 to 1966; Aljustrel, from 1867 until today as currently active and Lousal from 1900 to 1988). As it happens with industrial cases, these ideals are entailed to figureheads of the respective exploring companies (with the exception of Aljustrel that presents no bibliographic highlight that can support this claim; despite the observance of a paternalist concern related to housing and community facilities).

Regarding the studied sites, this paternalism has endured beyond the closure of mining activity and installations as the companies maintain the property rights regarding their estate and concessionaire areas. Even in the case of Aljustrel that has been explored by four distinct companies, there is a sense of continuity and proximity to the locals. Both S. Domingos and Lousal have a visible parallelism regarding chronological events that are rehabilitation intents, sensibly, from the 1980 to 1990. In all the mining sites there are still being done legalization/donation processes of the mining neighborhoods, by the companies to the municipalities or/and to the population (former employees and respective heirs), which conveys the contemporaneity and pertinence of an ample reflection about Portuguese mining landscapes.





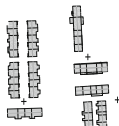
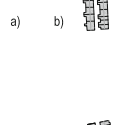




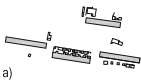

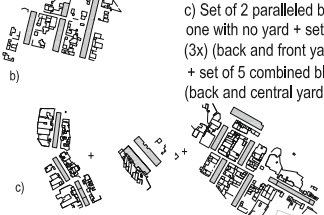





### **3.2 Synthesis of the Morphological Analysis**

The morphologic analysis was structured as follows: (a) administrative and geographical contexts of the four sites as a whole and (b) urban and heritage contexts of each of the three mining sites (S. Domingos and Pomarão were treated conjointly because they have the same origin and belong to the same mining complex). Regarding the urban context, the details of the mining neighborhood is due not only to the research domain—architecture—but also, their importance in the agglomerates composition and therefore its territorial understanding. The sites are presented not accordingly to antiquity but from geographic orientation from west to east (see Figs. 2, 3 and 4).

The existing researches and respective approaches related to these mining sites (as isolate entities) are mainly from other fields of knowledge, which are not suitable to construct and convey a common syntax defining a territorial system, from local to regional, based upon the morphological elements observed thus abridged and classified.

CHARACTERIZATION	LOUSAL	ALJUSTREL	S.DOMINGOS	POMARÃO
Territorial expression (system)	Unit	Unit	Combined units within a common sub-system of the territorial narrative	
Site composition	Combined (linear & disperse)	Combined (linear & 2 internal and concentrated centers)	Combined (linear & 3 internal and concentrated centers)	
Spatial centers and their nature	2 developing areas: mine site and museum area (equipments)	2 centers. S. João e Alagares, village developed inter-totally (fundamentally industrial)	3 developing sectors: former English neighborhood, workers villages and mix areas (housing+ equipment)	
Structural avenues	(2)	(2)	(0)	(1)
PUBLIC SPACES (Most Representative)				
FORMAL/INTENTIONAL				
A. Central square (formal)				
A.1. Square (plaza)		  	 	
B. Square				
REMINISCENT SPACES				
C. Simple			  	
D. Resulting spaces near referential buildings	 Associated to the museum handicraft center lin and former GNR  Associated to the church and mortuary actual market			
E. Interstitial spaces (neighborhoods)	1. Between block/quaters (simple) a) expressive (dimensions) ex: Bairro da Direcção 2. Between block/quaters (combined) a) access + expressive central space ex: Bairro das Oliveiras	1. Between block/quaters (simple)  1.1. Between block/quater (access to a common/individual yard) 	1. "Rua-pátio" (straight)  1.1. Street (curve shaped)  (ex: P. Chança e Guadiana) 1.2. Expressive interstitial space (after 1950s) 	"Rua-pátio" (straight) 

Fig. 2 Sites morphological analysis: singularities and complexities. Author: M.D. Oliveira supported by graphic data provided by GTG, CMA, CMM (Lousal, Aljustrel and Mértola Municipalities Planning Divisions, respectively). The classification of the S. Domingos spaces respects the Carvalho (2009) work

LOUSAL	ALJUSTREL
<p>Block/quarter width various between 7 &lt; 10 m Block/quarter length various between 25&lt;72m</p>  <p>1. Simple and singular block/quarter.</p>  <p>2.Singular block/quarter combined (+ yard ), various dimensions.</p>  <p>3. Set of 2 paralleled block/quarters with the frontal facade to the access way.</p>  <p>4. Set of 5 singular paralleled block/quarters with the frontal facade to the access way.</p> <p>5. Mixed set of block/quarters</p> <p>a) Set of two paralleled block/quarters (2x) with the frontal facade to the access way + 1 perpendicular block/quarter.</p>  <p>b) Set of two paralleled block/quarters (2x) with the frontal facade to the access way + 1 singular block/quarter + 2 block/quarters with no communication between them and perpendicular to the previous ones.</p>  <p>c) Set of two paralleled block/quarters (2x) with the frontal facade to the access way + 4 paralleled block/quarters + 1 perpendicular block/quarter.</p> 	<p>Block/quarter width various approximatedly between 8 &lt; 12 m Block/quarter length various between 23 &lt;72m</p>  <p>1. Simple and singular block/quarter.</p>  <p>2.Set of 2 paralleled block/quarters (various dimensions) with the frontal facade to the access way.</p>  <p>3.Set of 3 paralleled block/quarters.</p> <p>4. Mixed set of block/quarters</p> <p>a) Set of 4 singular block/quarters unaligned spatial disposition.</p>  <p>b) Set of 4 paralleled block/quarters (4x) combined (back yard and central yard) + set of 4 paralleled block/quarters (4x) various combined dimensions (yard space).</p>  <p>c) Set of 2 paralleled block/quarters (2x) one with no yard + set of 3 block/quarters (3x) (back and front yards) + set of 5 combined block/quarters (5x) (back and central yards).</p> 
S.DOMINGOS	POMARÃO
<p>Block/quarter width various between 8 &lt; 10 m Block/quarter length various between 64&lt;150m</p>  <p>a)</p>  <p>b)</p> <p>1. Simple and singular block/quarter a) curvilinear b) rectilinear</p>  <p>2.Set of 2 paralleled block/quarters (+ backyard)</p>	<p>Block/quarter width &lt; 5,40 m Block/quarter max.length is 57 m</p>  <p>1. Building in block various dimensions</p>  <p>2. Building in block various dimensions +yard</p>

**Fig. 3** Workers neighborhoods: definition in blocks/quarters (composition and spatiality). Author: M.D. Oliveira supported by graphic data provided by GTG, CMA, CMM (Lousal, Aljustrel and Mértola Municipalities Planning Divisions, respectively)





















LOUSAL	ALJUSTREL	S.DOMINGOS
<p>Cell area between 10-11 m2</p>  <p>1. Multicellular by the aggregation of 2 bicellular sets in depth and 1/2 of a cell (vertically) comprised in width forming a singular block/quarter, dated between the beginning of the XX century and the 1930-50 decades.</p>  <p>2. Multicellular by the aggregation of 2 bicellular sets in depth and 1/4 of a cell comprised in width forming a singular block/quarter, consolidated on the 1950s.</p>  <p>3. Multicellular by the aggregation of 2 bicellular sets in depth intermediated by a distribution space and 1/3 of a cell forming a singular block/quarter, circa 1960s.</p>  <p>4. Multicellular by the aggregation of various combinations of cells (fig. etc.), circa 1970s.</p>	<p>Cell area approximately 40 m2</p>  <p>1. Monocellular, integrated in the beginning and end of the block/quarter observable circa 1950s.</p> <p>Cell area approximately 15-16m2</p>  <p>2. Bicellular by the aggregation of cells (width) the block/quarter observable circa 1950s.</p>  <p>3. Tricellular or quadricellular both in width and depth</p>  <p>4. Bicellular in depth, from 1950-60-70s decades.</p>  <p>5. Bicellular conjugated with 3 minor cells, 1960-60s.</p>  <p>6. Multicellular by the aggregation of 2 cells and a 1/4 of a cell, L shape, 1950-60s.</p>  <p>7. Multicellular by the aggregation of 4 cells forming a square, dated 1950-60s.</p>  <p>8. Multicellular by the aggregation of various combinations of cells, observable circa 1960-70s.</p>  <p>9. Multicellular by the aggregation of 2 bicellular sets and 1/4 of a cell, aggregated in depth, dated between 1950s and 1960-70s.</p>  <p>10. Multicellular by the aggregation of various combinations of cells, observable circa 1960-70s.</p> <p>Cases universe: neighborhoods S. João, Valdeca and Plano (old and new) and Algaes (Cima and Baixo)</p>	<p>Cell area approximately 16 m2</p>  <p>1. Monocellular on a singular block/quarter.</p>  <p>2. Monocellular on a double block/quarter.</p>  <p>3. Bicellular by the aggregation of cells in width.</p>  <p>4. Multicellular by the aggregation of 3 cells, L shape.</p>  <p>5. Multicellular by the aggregation of 4 cell, square shape.</p>  <p>6. Multicellular by the aggregation of various combinations of cells.</p>

Fig. 4 Workers neighborhoods: modular composition. Pomarão was not included due to the absence of existing data. Author: M.D. Oliveira from GTG, SAPEC and ALMINA archives, Carvalho (2009)

This is particular relevant as it is considered necessary simultaneously to address interdisciplinary issues as well as provide a methodology that has an effective expression in the territory. The previous analytical synthesizes assert that, beyond their particularities, there are spatial similarities that allow a common classification of the existing structuring spaces of each site, thus supporting and establishing the whole contexture as a “Cultural Landscape of the Alentejo Pyrite”.

More importantly, it also provides the grounds for a proposed methodology for the design of “cultural landscapes” beyond UNESCO and biding to the expectancy of valorization and enhancement of ordinary territories.

### 3.3 Results

For the conception of the Cultural Landscape of Alentejo Pyrite were considered the following methodological items:

- Cultural Landscape conceptualization and the definition in particular of mining landscape, which is focused on typological characterization rather than focused on theme. Most definitions of cultural landscapes and even when subcategorized are lacking of an operative dimension (Bustamante, 2008). It was considered that this phase must precede the reading and the territorial analysis as it establish and convey the common ground to both interdisciplinary and cooperation between municipalities that integrate the proposal—Grândola, Aljustrel and Mértola.
- Scope/morphogenesis definition derived from the territorial reading and classification as a “non apparent structured area” that provides the general delimitation of the proposal as a consequence of the geological infrastructure. This assessment is just a preamble as it is only justified and/or reaffirmed by the analysis presented on 3;
- Design of the proposal physical structure: system definition as multinuclear that derivate from a particular “*chrono/topos/logos*” (Oliveira & Ribeiro, 2013) of the mining landscape, obtained by:
  - Historical documentation and respective chronology of events of each of the sites that allows not only their origins and evolution context, but also eventual parallelisms on more current events mainly local concerns regarding rehabilitation;
  - From the existing iconographic and graphic data (some inedited and or recovered for the research proposes) it was established the morphological and structural base of each site allowing an interpretative synthesis and above all of common morphological elements and events, integrating the narrative and contexture of this particular territory. In this sense, it distinguishes itself from a more traditional inventory—although it is a consequence of an inventory—constituting a unitary catalogue/cartography.
  - Regarding the proposal, there was a restatement of sites that had a geographic expression from the get go. The research also allows the definition of criteria

for the inclusion of other sites from the Iberian Pyrite Belt<sup>1</sup> as it was systematized for current sites;

- Concerning the narrative construct, associate the assessed interpretative elements resulting from the morphological approach to the Pyrite Route<sup>2</sup> (Matos et al., 2010) which resumes a geological heritage approach, as well as the sociological one and the existing interpretative centers. This kind of route constitutes the backbone of a cultural tourism initiative in which the incorporation of the architectural input could only increase. Its interpretation should also be based on present resources:

Existing infrastructures as the mining railways or “reference-elements” as designed by the research of each site, the water deposits and fountains (Lousal), windmills (Aljustrel) and collective ovens (S.Domingos/Pomarão). Despite the fact that these elements have not a particular industrial nature, they constitute the permanence elements in the respective evolutionary analysis. In the case of their association with “belvedere spaces” (as identified on the Oliveiras neighborhood, Lousal—see E.2 on Fig. 2), it is important to clarify if they are intern/extern to sites;

The public space expression as systemized as public spaces (Fig. 2) and semi-publics (Fig. 3) and private/cellular (Fig. 4) present on these 30 neighborhoods. In the case of public spaces besides the already mentioned classification, it was identified particular character spaces according to typological criteria (associated with reference buildings or its particular position within the site) and social-historic criteria (associated with collective rites and signs);

Regarding paths it was distinguished between the ones with historical character, remnant or allusive from the others, due to the verified informality within the sites;

Isolated elements and/or with interpretative possibility as viewpoints (such as the hermitage of Santa Teresa in Pomarão) and if they are intern/external to the sites;

Rites or other tangible or intangible elements of collectiveness.

The designation of “Cultural Landscape of the Alentejo Pyrite” has the agenda of territorial characterization and valorization under a global image that has the reflexive contribute provided by the research the ultimate goal a prospective image (from analysis to a operative image of the whole). Still regarding the product/global image it is considered that color provides and identity reference element, the consensus between walls solely white (as verified at S.Domingos) or with yellow

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<sup>1</sup>For example, Spanish agglomerates or even other satellite sites of variable scale (as the Faleiros neighborhood in the case of Lousal or, for instance, other integrating sites of the S.Domingos mining complex).

<sup>2</sup>This route has equally the value of presenting a cross-border potential regarding the territory reading, each site can be analyzed according to the provided classification established by the analysis presented on 3.



trims (associated with the Alentejo region) or blue trims (associated with mining housing). It is essential for a clear identification of the proposal sites.

Equally, the designation provides the general theme of the proposal, however it can integrate sub-themes considered of the same nature or complementary (as analyzed on other Portuguese proposals). This distinction is a key to the proposal integrity and respective interpretation. In the case of sites that already integrate the proposal, for instance, there is a sub-theme of similar nature with the recent classification of S. Domingos/Pomarão as a part of a Public Interest Ensemble (PCM, 2013).

Therefore the theme/project units are:

- (a) Lousal: from topographic particularity (1900). It is thus enhanced the fact that the workers are implanted on higher ground opposite of what it is common on industrial settlements. The Oliveiras neighborhood “belvedere space” provides an additional aspect of composition;
- (b) Aljustrel: The continuities within the ever-changing territory (1867). It was considered that the site is not functionally closed as the mines are still active but the existing neighborhood provide as permanence events (see Rossi, 1966, 2001) although they are not of particular excellency;
- (c) S.Domingos/Pomarão: From the mine to the Guadiana River (1858). It is thus reinterpreted the already mentioned classification as a Public Interest Ensemble introducing these sites on a more late territorial narrative;

Nevertheless the found common traced elements, each site represents in itself a specific spatial composition: Lousal, linear and dispersive; Aljustrel combined (linear and polarized, aggregated by an existing site prior to the mine settlement); S. Domingos combined (linear and with three internal nucleus beyond the intrinsic polarity of the mine pit) and Pomarão, linear due to its fluvial port characteristics.

Each of the four agglomerates has local rehabilitation initiatives that the proposal aims to elevate to the regional level, duly supported and institutionally recognized an urban plan, in this case a inter-municipality plan which is the Portuguese planning frame more suited.

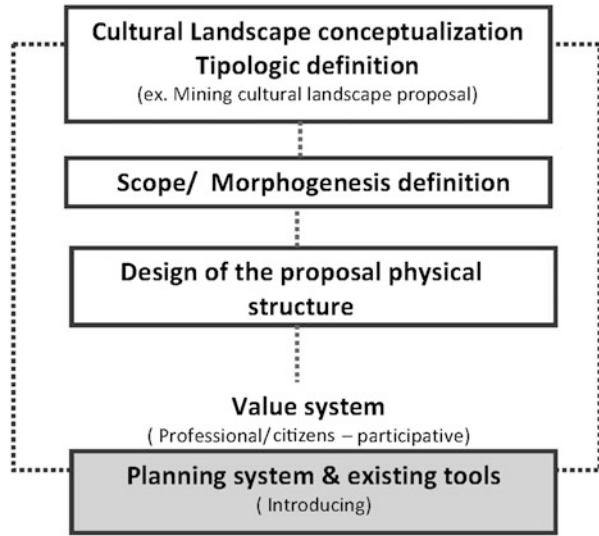
## 4 Conclusion

“Cultural landscape”, both as a concept and as a territorial project, should be further discussed by the various areas of knowledge that intervene in the territory, so that it can address to the present issues regarding landscapes which are often fragmented and absent of meaning. Heritage can play an important role if it is thought systemically within its context, constructed by a supported morphological contexture (see Fig. 5).

Regarding the proposal it is considered the future research based considerations:

- Promote the participated discussion related to the conceptualized proposal of Cultural Landscape with the various participants, regionally and nationally;

**Fig. 5** Methodology diagram: concept and proposal definitions consequent introduction in the existing planning system (plans and heritage classification values reevaluation). Author: M.D. Oliveira from GTG, SAPEC and ALMINA archives, Carvalho (2009)



- Develop an Inter-municipality Plan and respective management (as previously stated) in which the communities and respective mining companies are also involved;
- Articulate this Plan with the existing Municipal ones and in the case of S. Domingos/Pomarão, incorporate the existing Safeguard Plan in this strategy;
- Deepen the study of regional satellite nucleus and Spanish, with the generic common cord provided by the morphological event of geological nature that is the Iberian Pyrite Belt;
- Deepen the working relation with the Lousal Ciência Viva Center, initiated during the research, taking strategically advantage of its existence to establish in Lousal the introduction frame for the territorial narrative to be presented;
- In the case of Aljustrel, due to its current activity and respective evolution while having in consideration the research role and operative input for development plans.

All said and done, the research “what is next” can continue beyond the academic world as was intended from the get go however the question mark can not be denied as the paradigm only now begins to shift.

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# Sustainable Tourism. Mdina: A Situation Analysis of a Cultural Destination

Nadia Theuma, George Cassar, Sarah Faith Azzopardi,  
and Giuseppina Cardia

**Abstract** This paper looks at tourism in the walled town of Mdina. It discusses the main tourism impacts on the city through economic, social and cultural aspects. Furthermore it assesses the use of ICT in cultural heritage management. An examination of various aspects underlines how tourism has impacted the city in the past 20 years and demonstrates that residents in Mdina have, over time, adapted to tourism activity. Such activity leads to particular effects such as positive proceeds which in turn prompts the tourism enterprises within the city to do their best to become more accessible to visitors especially through the use of ICT. This helps the city to become more sustainable.

**Keywords** Tourism • Cultural heritage • Sustainable indicators • Mdina • Malta • HELAND • ETIS

## 1 Introduction

Tourism is an economic activity, which is now considered by all as an important industry. Nevertheless, this does not diminish its potential to serve as a tool for the positive development of society and a means of good governance, should the right principles of sustainability be implemented. In the past, tourism had primarily been viewed in terms of its economic advantages, marked by an increase to a country's revenue and expanded employment; however, the resources of the tourist destination were also extensively exploited, and this led to much uncontrolled development (Călărețu and Bulin, 2011). However, as tourism practices are part of human activity, these are continually being influenced and affected by changes experienced by society which remodel and redesign the daily realities of this industry. This prompts us to take a brief look at the stages that have affected tourism growth and sustainability along time. There being numerous paradigms and perspectives of development theory, it is not the intention of this paper, due to the restraints of time

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and length, to go deeply into each and every one of these, but it is very pertinent to give a brief outline of some of the development theories.

## 2 Development Theories and Sustainable Development

Keynesian theory emerged during the Great Depression of the 1930s. It argued that growth should be controlled by national governments which adjust measures such as tax cuts and pay cuts to control demand and therefore ensure stable growth and employment (Keynes, 1936). The modernisation development paradigm developed by Rostow mostly along the 1950s and 1960s, is characterised by the importance given to economic development, industrialization and state involvement within societies (Rostow, 1960).

A criticism of the Modernisation theory provided by the Neo-Marxist Andre Gunder Frank prompted the advent of Dependency theory which rejected the idea that developing countries and regions should follow the development stages of developed countries by taking the route through agriculture and industrialization (Frank, 1969) to achieve growth. Modernisation theory argues that previous growth in western countries was achieved through colonialism where there was investment in technology and the buying of cheap raw resources from less developed countries and believe that, if developing countries want to achieve economic growth they should follow the same path of development. Dependency theory, however, does not support the Modernisation theory as it holds that though developing areas are at present in a non-colonialism situation yet this does not necessarily mean that they are politically and economically independent; and they may also be weaker members in the world market economy and have distinctive features that indicate that they are not just primitive versions of developed countries.

Tourism Area Life Cycle theory (Butler, 1980) explains Dependency theory from a tourism perspective. It argues that dependency is a negative influence on tourism areas because, if balance is not achieved, there could be economic leakages from the local destination to core regions. Therefore, it continues, tourism destinations experience stable growth when there is less dependency.

Malta was a British colony from 1800 until it gained its political independence in 1964. However, the emergence of tourism as an economic activity showed the dependency relationship lingered on in the post-independence era and to some extent is still present up to this day. For many decades since 1964 Malta's incoming tourism market was highly dominated by the UK tourism and political relationships, and this has limited diversification and weakened the tourism economy (Falzon, 2003). This British domination has, arguably, been mitigated by a more diversified source tourism market though it is still the strongest single source market for Malta (Malta Tourism Authority, 2014).

Although previous development theories incorporated important elements which are still relevant for the growth process in modern economies, they fail to mention other resource limitations, where, for example, the prediction that land is a limited

resource and could bring economic growth to a standstill was not taken into consideration and therefore carrying capacity limitations are not given their due attention.

Empowerment theory criticizes the development theories, since it contends that an increase in GDP and political independence does not bring with it an increase in general prosperity. Real prosperity is achieved by development growth sustained by respecting fundamental human rights since, “Development must be woven around people and not people around development and it should empower individuals and groups rather than disempower them” (UNDP, 1993: 1).

Sustainable development is a more recent development principle that underlines two elements, namely, the significance of development and the circumstance required for sustainability. Similar to the Empowerment theory, it recognizes that “development is not just about increasing wealth but about a change in behavior, aspirations to an increase in the quality of life” (Tosun, 2000: 2). Sustainable development reflects on the idea that the natural resources within a place are not unlimited. What is being emphasised in sustainable development is a level, not a growth, of physical resource use (Tosun, 2000). This means that what needs to be developed is the qualitative capacity of using the world’s unlimited non-renewable resources to improve and create goods and services for satisfying human needs, without destroying the resource base which all humans and ecological systems depend upon (Tosun, 2000).

### 3 Sustainable Tourism Development

Sustainable Tourism Development is relatively new and has gained significance in these last 20 years. It is an adaptive concept emerging from the parent concept of sustainable development and therefore contributes towards the same objectives and principles (Liu, 2003) related to the destination. Sustainable tourism focuses on quality, continuity and balance. Quality through sustainable tourism translates into a valuable experience for visitors, in the context of improving quality of life of communities and brings forth the significance of the natural environment. “Sustainable tourism cannot exist without the continuity of the natural resources, culture and customs of host communities” (Călărețu and Bulin, 2011: 62). Sustainable tourism aims to ensure a balance between all stakeholders including the tourism industry, social players, environmental representatives, the government, the local authority and local communities. In order to ensure continuity of cultural, natural and local community resources, the management strategy has to involve long-term planning and stakeholder engagement. “If we protect the environment in such a way as to bring about long run economic misery, we would be defeating the whole purpose of development. If we promote economic wellbeing in the short run, and lead to environmental and social degradation, we will be winning one battle and losing another, with the end result of ending up worse in the long run” (Briguglio 2003). On the Malta scene, in the case of Mdina (see below, HELAND

Project Pilot Site), the residents living within the small walled city have lamented that, due to the heavy influx of mass tourism they feel they are a museum display (Orbasli, 2000). The “question remains as to whether Mdina will be able to remain a place for its residents or will simply be turned into a commercial museum for visitors” (ibid.:98).

#### **4 Destination Competitiveness Measurement Concepts**

Sustainable tourism development is also closely linked to destination competitiveness, which attempts to measure tourism economic impacts and is used to develop destination management. For a destination to be competitive, the development of a tourism destination must be sustainable, not just in economic terms but also in environmental, social, cultural and political terms (Ritchie & Crouch, 2000, 2003). Moreover within the balance sought by sustainability principles, destination competitiveness emphasizes that the place must not only attract large numbers of tourists but must also be able to deliver an attractive tourism experience which surpasses that of competing destinations. The drive for an edge in the tourism experience has nowadays developed into an increasingly elaborated objective of different destinations by leveraging on creative tourism and ICT. As Richards has observed, “Tourism destinations seeking to distinguish themselves from their increasingly numerous competitors have turned to culture as a means of distinction, and culture has been linked to tourism as a means of generating income and jobs” (2001: 24). Moreover, regarding the commercialization or ‘serial reproduction’ (Harvey 1989; Richards and Wilson 2006) of culture, it can be argued that cultural development is no longer sufficient to create distinction between destinations. These have thus started to replace culture-led development strategies with creative development, putting creativity and innovation on a higher level of importance in their development strategies, and in particularly in tourism development (Richards and Wilson 2006).

Tourism competitiveness mostly takes the approach of the measurement of economic indicators. Tourism Satellite Accounts (TSA) are used by various destinations to measure the GDP, employment, tax revenues, tourism consumption and characteristics of tourism human resources. These have become a useful tool to bring out the necessary knowledge needed by various direct and indirect stakeholders to underline the necessary importance of tourism and its contribution towards the economy whilst it generates the products and services required for consumption by visitors. A criticism of TSA is that it fails to include the measurement of positive and negative tourism impacts comprising those environmental, social and cultural.

## 5 HELAND Project, Mdina Pilot Site – ETIS Indicator System

The Heland Project is a European framework project aimed at promoting socio-economic sustainable development through innovative technological actions for Mediterranean heritage tourism and landscapes protection clusters. It is a project under the 2007–2013 ENPI CBC Mediterranean Sea Basin Programme which is a multilateral Cross-Border Cooperation initiative funded by the European Neighbourhood and Partnership Instrument (Heland Project, [n.d.](#)).

For its objectives this Project is implementing a more comprehensive indicator system, that is, the European Tourism Indicator System (ETIS). In Malta, one chosen pilot site on which this tool has been used, is Mdina. The ETIS tool has been commissioned by the European Commission, through the DG Growth (formerly DG Enterprise and Industry), with the purpose to provide the tourism stakeholders with a toolkit that assists them in measuring sustainability impacts and benchmark their progress and performance in the future (DG Enterprise and Industry, 2013). The ETIS tool measures tourism impacts on a tourism destination level and takes into consideration the environmental, economic, social and cultural impacts on this destination. The ETIS is composed of 27 core and 40 optional indicators that can be integrated on an optional basis. The 67 indicators are divided into the four sustainability pillars which consist of: 4 core and 5 optional Destination Management impacts; 5 core and 9 optional Economic Value impacts; 7 core and 11 optional Social and Cultural impacts; and, 11 core and 15 optional Environmental impacts. The ETIS is a more comprehensive system based on sustainability principles quoted by Agenda 21, chapter 40, which states: “indicators of sustainable development need to be developed to provide solid bases for decision-making at all levels and to contribute to a self-regulating sustainability of integrated environment and development systems” (Briguglio 2003).

## 6 The Town of Mdina

The fortified small town of Mdina is located on the hilltop in the western central part of Malta. This town, has a history that goes back thousands of years as it was occupied by Phoenicians, Carthaginians, Romans and Byzantines. It has an Arab flavour with narrow winding streets traceable to Aghlabite and Fatimid Arab rule. Indeed the present footprint originates from Arabic rule, who reduced the Punico-Roman enceinte by about two-thirds. It was the principal town of the Maltese Islands up until the time when the Knights of St John’s arrived in Malta in 1530. Mdina has from at least medieval times hosted the palatial residences of the Maltese noble families who have continued to conserve and value their sumptuous and historic Renaissance and Baroque homes.



Mdina is one of the most popular tourism sites in Malta, welcoming 90 per cent of tourists that come to Malta, and which works out at about 1.3 million persons every year (MTA, 2013). This is a huge influx of tourists especially when taking into consideration that in Mdina there are only 237 residents (NSO, 2011) dropping steadily from the 325 residents of 1992. In 1993, Boissevain and Sammut had already indicated that the residents felt like they were being obliged to sacrifice their privacy and tranquillity for the national good without compensation from either government or tour operators (Boissevain, 1996). Questions that one may consider asking, given the increasing influx of tourism arrivals and the decrease of the resident population by 25 per cent in the past 20 years may include: How has the relationship between tourists and residents evolved? Has this relationship any effect on the decrease in the number of residents? Is there really a possibility that Mdina eventually becomes a museum town?

## 7 Methodology

For the present project two studies were conducted. The first one dealt with the measurement of economic, social, cultural and environmental impacts of tourism on Mdina. This study was commenced in February 2014. The questionnaires were designed based on the sustainable tourism indicator tool in order to create questions applicable to the different stakeholders in Mdina including the police, the Local Council, residents, the business community, cultural attractions and visitors. For the sustainability research, 238 respondents, consisting mainly of international visitors, were selected using the random sampling method and stopped at various points in Mdina, including Greeks' Gate, Main Gate and Cathedral Square. Another 38 questionnaires were administered to Mdina residents. Questionnaires included closed ended questions that reflected the ETIS indicator toolkit. Another 36 in-depth interviews were conducted with each of the tourism cultural attractions. The tourism business community including restaurants, bars, and souvenir shops, while the cultural attractions comprised museums and audio visual attractions. Given that in Mdina there is only one hotel within the walled space, a separate in-depth interview questionnaire was designed specifically to address the hotel accommodation sector. Data compiled from the questionnaires was then processed and analysed using the Statistical Package for Social Science (SPSS).

The second study dealt with ICT and cultural tourism attractions was began in February 2014. It aimed at finding the penetration of ICT within Mdina's cultural tourism attractions and to assess the visitors' perception of ICT on Mdina as a tourism destination. In March 2014 one questionnaire for cultural attractions and another for international visitors were designed and as from April the collection of primary data was undertaken. For the ICT research, 100 respondents consisting mainly of international visitors was selected using the random sampling method. This was administered at various points in Mdina including Greeks' Gate, Main Gate and Cathedral Square.

For the ICT enterprise, 9 cultural attractions were interviewed. Out of these, 1 is a historic house museum, 3 are religious museums, 3 are audio-visual attractions, 1 is a stately home, and 1 is an archive.

## ***7.1 The Findings Related to the Sustainable Tourism Indicators***

### **7.1.1 Pilot Site Management**

From the in-depth interview with the representative of Mdina Local Council, it emerged that Mdina has no sustainable tourism strategy or plan and neither is it represented by a pilot site management organisation.

As regards tourism and cultural attractions, 2 (28.6 %) out of the 7 cultural attractions, and 4 (13.8 %) out of 29 tourism enterprises stated that they had an environmental and/or sustainable certification as part of their tourism management. Regarding Corporate Social Responsibility Policy (CSR), 3 (42.9 %) out of 7 cultural attractions and 5 (17.2 %) out of 29 tourism enterprises have a CSR Policy. Despite the fact that most cultural and tourism enterprises do not carry out corporate social responsibility measures and activities to positively affect the environment and local community, on the other hand 6 (85.7 %) out of 7 cultural attractions stated that they communicate sustainability efforts to tourists and the general public. Therefore, results show that there is more effective communication and marketing of sustainability efforts to tell tourists about what is being done rather than actually implementing CSR policies themselves. The number of tourism enterprises that communicate their sustainability measures reached 27.2 %, a number which is similar to that of those implemented CSR within Mdina.

Only 15 (40.6 %) residents out of 37 confirmed that they are involved in the planning and development of tourism. On the other hand, 83.1 % of visitors tend to be very satisfied with the tourism experience in Mdina and 80.3 % are aware of sustainability efforts within the pilot site. The number of repeat tourists is that of 22 %, most of these having visited Malta more than once in the last 30 years.

### **7.1.2 Economic Value**

#### **Tourist Profile**

The results obtained, as shown in Table 1 and from the visual representation of Graph 1, the most prominent international tourism arrivals to Mdina are from the UK (22.9 %) and Italy (20.4 %). This reflects the distribution of visitors to the Maltese Islands.

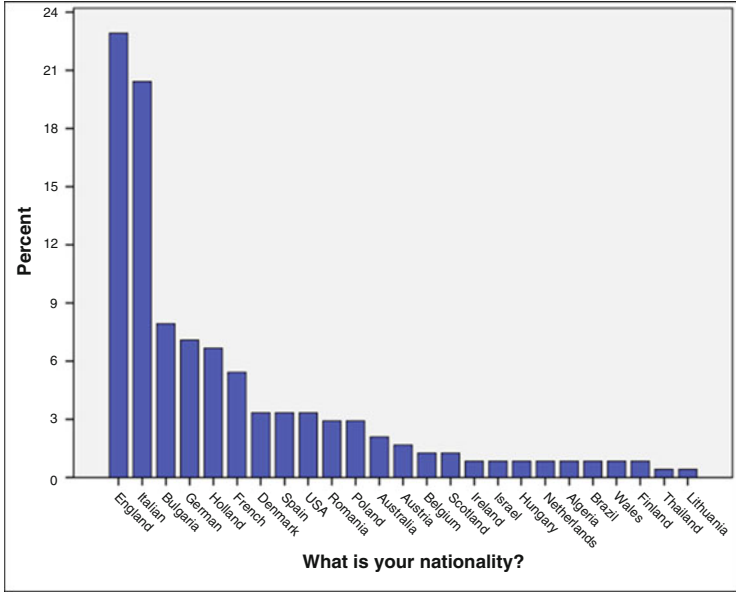
**Table 1** Tourist source markets

		Frequency	Percentage (%)
What is your nationality?	Finland	2	0.8
	England	55	22.9
	German	17	7.1
	Israel	2	0.8
	Bulgaria	19	7.9
	Spain	8	3.3
	Ireland	2	0.8
	Denmark	8	3.3
	Italian	49	20.4
	French	13	5.4
	Lithuania	1	0.4
	Thailand	1	0.4
	Wales	2	0.8
	Australia	5	2.1
	Poland	7	2.9
	Scotland	3	1.3
	USA	8	3.3
	Holland	16	6.7
	Austria	4	1.7
	Brazil	2	0.8
Romania	7	2.9	
Belgium	3	1.3	
Algeria	2	0.8	
Netherlands	2	0.8	

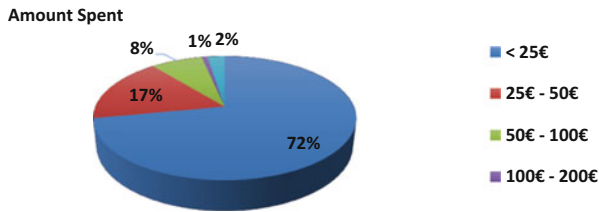
### Daily Visitor Expenditure and Length of Stay

The visitor expenditure is based on items such as accommodation, transportation, food and drinks, shopping, entertainment, and entrance to museums. The total per capita expenditure is of Euro 910 (MTA, 2014). From the graphical representation below (Graph 2) it transpires that expenditure by visitors to Mdina ranges from Euro 200 to less than Euro 25 with the majority, that is 72 %, claiming that they spend less than Euro 25 during their visit to Mdina. This might be explained considering the relatively short stay of tourists most of whom remain on the site between 2 and 4 hours while only very few stay for half a day or a full day (Graph 3). Only 4 (1.68 %) visitors out of 238 are overnight visitors.

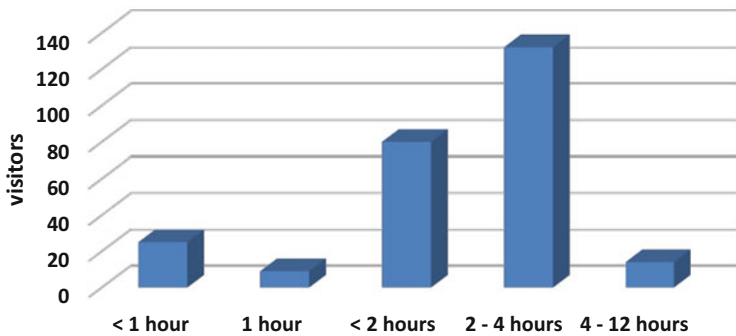
Regarding cooperation from the business community when it comes to marketing a common strategy for Mdina, only 17 % of business enterprises stated that they participate in cooperative activities. Such cooperative activities include involvement in associations of tourism enterprise and common promotional advertising programmes. This lack of community efforts to promote sustainability measures



**Graph 1** Graphical representation of tourist source markets

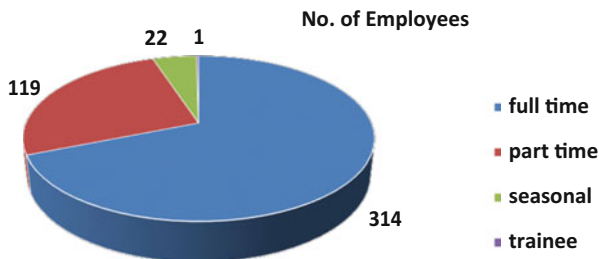


**Graph 2** Graphical representation of daily expenditure of tourists in Mdina



**Graph 3** Graphical representation of length of stay of visitors in Mdina

**Graph 4** Graphical representation of number of employees



from a community point of view is not mitigated by local authorities since, from the in-depth interview with the Local Council it resulted that Mdina lacks a Trade Destination Policy for the promotion of the purchase of local trade products and/or fair products and services.

Regarding the quality and quantity of employees, 456 employees are employed throughout the year on full time, part time, seasonal and traineeship basis (Graph 4).

### 7.1.3 Cultural/Social Impact

Tourism arrivals in Mdina reach 1.3 million visitors per annum whilst the local population is that of 237 residents. Despite this imbalance between tourist and resident numbers, generally locals are satisfied with tourism in spring (84.4 %), in summer (78.1 %), in autumn (75 %) and in winter (71.9 %) as seen in Table 2 and Graph 5. The satisfaction of locals with tourism in general could be explained to some extent when seeing their reply to the question about their involvement in the planning of tourism in Mdina, as can be seen in Table 3 and Graph 6.

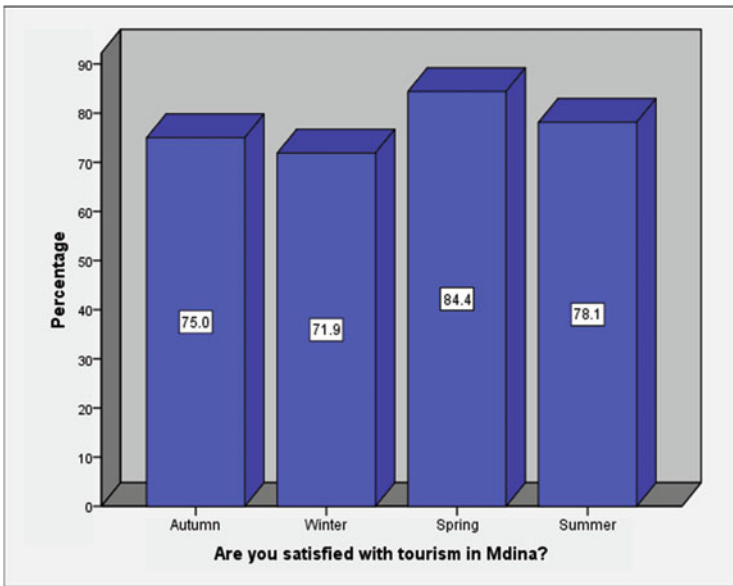
When tourists were asked to indicate the most popular cultural tourism attractions in Mdina, the more highly preferred attractions were the Cathedral and the architectural landscape of the Mdina streets. This shows that a good 24 % of visitors preferred to visit Mdina and just walk through the winding streets instead of visiting other attractions (Table 4, Graph 7).

Residents were asked about the most popular events in Mdina and which of those events were the most authentic and the ones that reflected their local cultural traditions. The event scoring high from the locals' perspective was the Medieval Festival, an annual event organized by various tourism stakeholders in Malta including the Malta Tourism Authority, re-enactment groups, and cultural and tourism attractions (Table 5, Graph 8).

When it came to authentic events tied to local culture and tradition in Mdina, from Table 6 and Graph 9, it transpires that religious events ranked first, gaining a score of 64.3 % of replies. This shows that despite the fact that the most popular events are the ones organized by stakeholders from outside Mdina's local community and are very popular since they are mostly advertised and visited by tourists, on the other hand the ceremonies and events that most represent the local traditions of the community are the ones that are the 'living ceremonies' practised by the

**Table 2** Residents’ satisfaction with tourism in Mdina by season

		Frequency	Percentage (%)
Are you satisfied with tourism in Mdina?	Autumn	24	75.0
	Winter	23	71.9
	Spring	27	84.4
	Summer	25	78.1

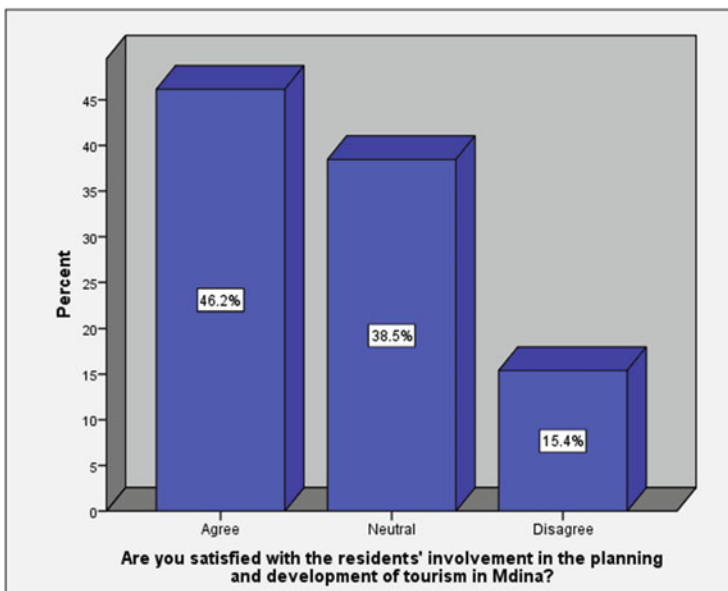


**Graph 5** Graphical representation showing satisfaction levels of residents in Mdina by season

**Table 3** Residents’ involvement in tourism planning in Mdina

		Frequency	Percentage (%)
Are you satisfied with the residents’ involvement in the planning and development of tourism in Mdina?	Agree	18	46.2
	Neutral	15	38.5
	Disagree	6	15.4

residents of the place. The question that begs an answer here would be: ‘Is Mdina’s tourism product moving towards a commercialized organized offer or is it still being true to the local cultural traditions of the place?’



**Graph 6** Graphical representation showing residents' involvement in tourism planning in Mdina

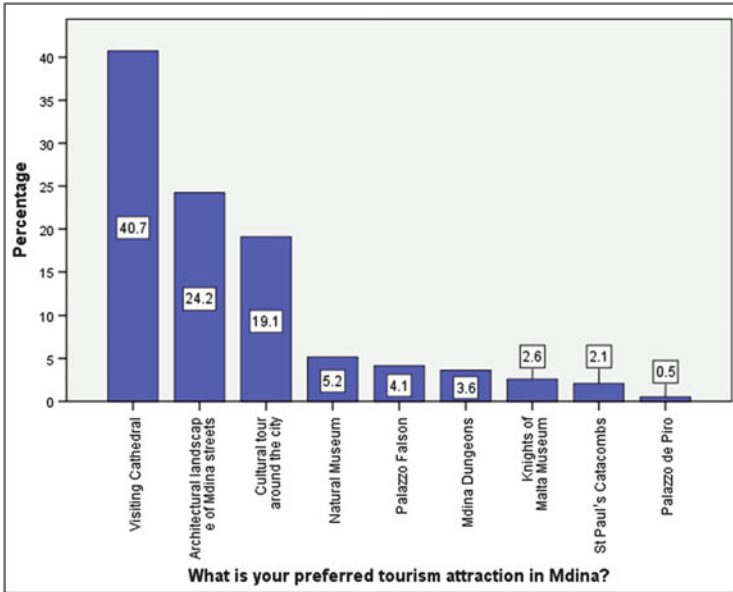
**Table 4** Tourists' preferred attraction in Mdina

		Frequency	Percentage (%)
What is your preferred tourism attraction in Mdina?	Mdina Dungeons	7	3.6
	Visiting the Cathedral	79	40.7
	Architectural landscape of Mdina streets	47	24.2
	Cultural tour around the city	37	19.1
	Palazzo Falson	8	4.1
	Palazzo de Piro	1	0.5
	Natural History Museum	10	5.2
	Knights of Malta Museum	5	2.6
	St Paul's Catacombs	4	2.1

## 7.2 Findings ICT

### 7.2.1 ICT Cultural Attractions and Visitors Community Involvement and Social Activities

Regarding social activities, 77 % (7 sites) of cultural sites responded that they organised social activities; 66 % (6 sites) stated that the main type of social



**Graph 7** Tourists' preferred attraction in Mdina

**Table 5** Most popular cultural tourism events in Mdina

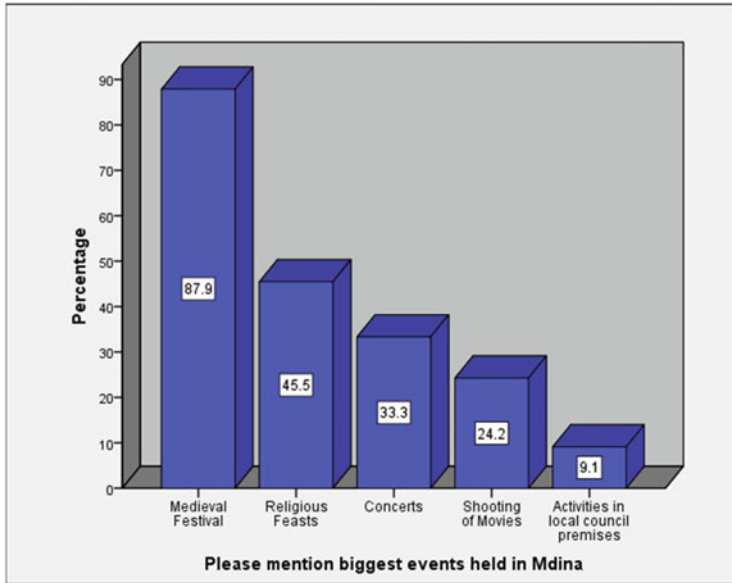
		Frequency	Percentage (%)
Please mention biggest events held in Mdina	Medieval festival	29	87.9
	Religious feasts	15	45.5
	Concerts	11	33.3
	Shooting of movies	8	24.2
	Activities in Local Council premises	3	9.1

activities were exhibitions; 1 did fundraising; 3 responded that their site is utilised as a meeting space; and 3 fell under the category 'other'. Further social activities included religious and spiritual workshops, tea-time concerts and a living space for retreats; while 2 responded that social activities consisted of workshops for children and old people. This question was offered a multiple choice response, where the respondent could choose more than one type of social activity organised within the site. All 9 sites (100 %) stated that they targeted both local and foreign visitors.

**7.2.2 ICT and Community Involvement**

There were 7 (77 %) out of the 9 sites that responded which utilise ICT for social activities. The type of IT utilised include social media, newsletters, IT systems for



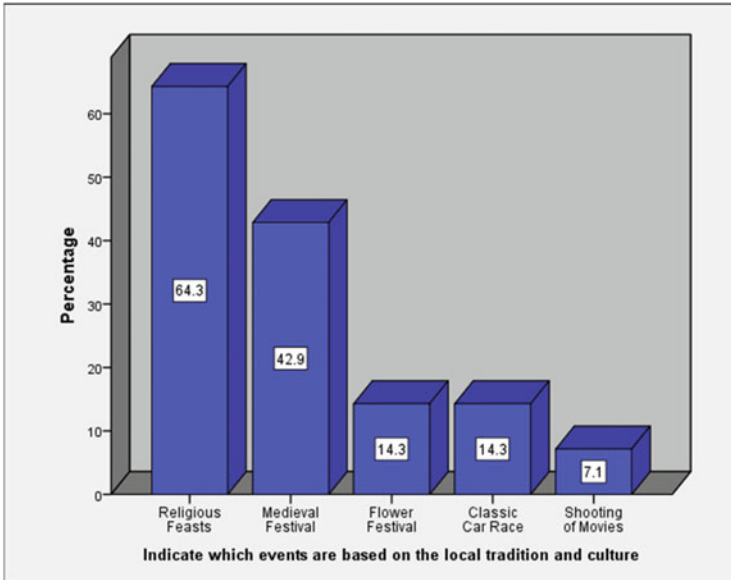


**Graph 8** Most popular cultural tourism events in Mdina

**Table 6** Cultural tourism events based on local culture and tradition

		Frequency	Percentage (%)
Indicate which events are based on local culture and tradition	Medieval festival	6	42.9
	Religious feasts	9	64.3
	Shooting of movies	1	7.1
	Classic car race	2	14.3
	Flower festival	2	14.3

audio visual shows and for digitisation of documents. A multiple choice question was put regarding how ICT is viewed within a site: 7 respondents replied that ICT was viewed as a way to promote communication and marketing activities to engage with the audience; 3 replied that ICT is viewed as a way to exhibit the artefacts; and 1 included ICT as a way to manage the organisation, and to categorise and document artefacts.



**Graph 9** Cultural tourism events based on local culture and tradition

### 7.2.3 ICT Presence Within Heritage Cultural Sites

With regard to the proficient use of the internet by employees, 8 (88 %) out of the 9 sites replied that more than 50 % of their employees are proficient in the use of internet. Only one replied that less than 10 % of the employees were skilled in the use of internet. On the other hand 7 (77 %) out of 9 respondents claimed that their employees communicate with their suppliers and internal management utilising ICT, specifically e-mail; 2 responded that employees do not utilise ICT for communication with suppliers; while 8 (88 %) out of 9 of the respondents claimed that employees are given access and the use of internet to communicate with clients electronically.

All the 9 respondents claimed that their sites have internet access and have a 'good' download speed and internet performance.

The 9 respondents also claimed that they had a website for the cultural site, with 4 (44 %) stating that the primary aim of the website was to provide information about the cultural value of the site to the visitors; 3 replied that the website was used as a communication tool between the heritage site personnel and potential and present visitors, and 2 said that the primary function of the website was e-commerce.

Regarding the technology utilised to enhance the presentation of the artefacts and interpretation, none of the 9 respondents claimed to have apps for their site. Only 2 replied that artefacts are digitised in order to be used through various technological means. All respondents said that they do not have QR codes; 3 had

self-guided tours, 1 had 3D audio visual, and 5 utilised ICT for signage. Again, 5 out of the 9 heritage sites had Multilanguage function for the interpretation of the artefacts.

Concerning the ICT and Innovation surveys to visitors, 67 % of the visitor respondents claimed that internet is important within a destination. Moreover, 58 % of international visitors stated that information stands to display guidelines and knowledge about Mdina take priority over wifi spots or 3G accessibility. 97 % of international visitors to Mdina had a smartphone with 58 % of visitors preferring to use the smart phone within a destination for maps and directions about the place. When asked whether they would prefer an electronic virtual guide rather than a personal local guide, 47 % replied that they agreed to have electronic virtual guides around Mdina, with 31 % preferring the personal attention of a local person, while 22 % kept a neutral stance.

## 8 Discussion and Conclusions

This paper has shown that the walled town of Mdina has adapted to the tourism influx which in the span of 20 years has increased from ca 950,000 in 1993 (Boissevain, 1996) to over 1.3 million visitors in 2014. This adaptation has however taken place at a cost. Residents in the city have declined and the few services present in 1993 aimed for residents have completely disappeared whilst the number of tourism-related attractions have increased. In a classic analysis of tourism impact assessment this would imply a negative trend. However, the study conducted in the past year has shown that residents reacted well to the changes happening around them. Clearly tourism is leaving economic impacts in that expenditure although on the low side is sufficient given that the majority of visitors spend between 2 and 4 hours in the city, and employment is rather high with tourism generating employment for more than 400 persons who live in the city and in the nearby towns.

The study on the use of ICT in the cultural sector has shown that visitors are keen to have more access to ICT for them to be able to enjoy the city. On their part, the enterprises within the city are willing to increase both the use and access to ICT. The study shows that further benefits could be obtained by using ICT in order to manage better the cultural heritage within the city.

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# The Development of Tourism in Albania and the Importance of Cultural Tourism

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**Abstract** Tourism is considered as one of the most important sectors for development and economic growth of a country. Albania has the appropriate potential for the development of this sector in all its specters such as coastal, mountainous, cultural, historic, curative etc. The main purpose of this study is to present the development of Tourism in Albania throughout 2000–2013 and focus mostly on cultural Tourism. As information source, we have used official ones such as INSTAT and WTTC. Statistic indicators represented in this study give a clear idea of the way Tourism in Albania has made during these years. An analysis of the factors that have positive and negative effects in Albania Tourism sector has its importance in reaching the necessary conclusions and recommendations for the future.

**Keywords** Tourism • Albania • Cultural Tourism • Statistical data • INSTAT

**JEL Classification** L83

## 1 Introduction

Tourism is one of the massive phenomena, which includes from year to year millions of people all over the world, thus constituting one of the branches with economic importance that provides touristically advanced countries with millions of dollars income.

Mediterranean countries, in which Albania is included as well, have shown a continuous interest on Tourism development from which have profited large income and which in turn has affected the prosperity of popularity, their economic

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strengthening as well as further development of Tourism. After 1990, new conditions for Tourism development were created as a result of economy transformation, from centralized to market economy, establishing in this way possibilities of encouraging and advancing private sector, reviving other sectors of economy close to Tourism, trade relationships between Albania and other countries etc.

The purpose of this study is to present the Tourism development in Albania with its strong and weak points. The methodology used in this study is based on secondary sources of data obtained from INSTAT and WTTC, 2000–2013. Through representation of many statistical indicators, we assess the path that has followed the Tourism development in Albania during these years.

The study is structured in several sections. The first section focuses on the importance of Tourism development in Albania as a developing country. In the second section, there are presented important statistical indicators in accordance with touristic activity in Albania. The third section is concentrated on Albania cultural Tourism and its features. The last but not least section focuses on the presentation of the factors that affect the Albanian Tourism progress and then recommendations and conclusions end this study.

## **2 The Importance of Tourism in Albania**

Tourism in general plays a very important role on developing countries such as the Albania. Tourism nowadays is considered as a priority and main branch, which will provide the economic development of the country and the improvement of Albanian popularity's lifestyle welfare.

The economic growth of the country, based on Tourism development, is already an undisputable fact. The income from Tourism is immediate and of high value. According to estimations from The World Travel & Tourism Council (WTTC) about Albania, the direct contribution of Tourism to GDP in 2013 was 68.1 milliard Leke or 4.8 %, whereas the total contribution to economy was 239.8 milliard Leke or 16.7 %.

As far as new work places are concerned, the Tourism sector has directly offered 41,000 job vacancies or 4.3 % of its total number, whereas indirectly it has offered 146,500 job vacancies or 15.2 %. In this case, we can realize the important role of Tourism in social aspect. Tourism sector offers job vacancies that require qualified and specialized employees. In conditions of Albania, where industry is slowly progressing and a low number of work force is present, where the phenomena of rural work abandonment is becoming more and more pronounced, the employment in Tourism, where the income is higher than in other sectors, means a continuous appeal to Albanian youth. In this way, Tourism manages to decrease unemployment which is obviously a concerning phenomena with considerable measures in Albanian society.

Albania reveals sufficient potentials to the development of activities and touristic products of different kinds such as: cultural, mountaneous, coastal, curative Tourism etc and this increases the role of Tourism development in our country. The development of Tourism also creates the possibility of fading out the barriers and

obstacles and in bridging the co-operation among peoples. Being an isolated country for a long time, Albania through Tourism, offers to foreigners the possibility to know and appreciate its culture and history. Albanians in this way can get to know and appreciate from close quarters the most important achievements of world culture. With the possibility of entering European Union, Albania has the chance to demonstrate its cultural and historic potential (MDGIF, 2010).

In Albania, there are many curative centers for different diseases such as rheumatism, breathing, heart problems etc. Near these centers, there are specialized teams of doctors that provide you with service and are in disposal of clients who usually suffer from various diseases and try to bring them back to normal life. Such centers are Glina spring, Postenat springs, SPAs of Elbasan, Peshkopi etc.

Tourism has a great importance in entertaining, relaxing and enjoying the time with the tendency to increase. In Albania, there are limitless spaces for accomplishing these physical and spiritual necessities. Even to Albanian society, the same as to nowadays industrially developed societies, Tourism is considered as an important economic and social factor that affects the evolution of society. A developed Tourism creates the possibility of relax, entertainment and enjoying the time. On the other hand, economic sector has a considerable importance to our country. Tourism nowadays is not a luxury and privilege of specific people, but rather a physical and spiritual necessity of all members of modern present day society. In order to achieve the desired level, the Albanian state and private sector are both contributing. The private sector is contributing with great investments in Tourism. Tourism is an important branch of economy, the income of which would affect its development through investments.

### **3 The Development of Tourism in Albania, Statistical Data (2000–2013)**

The methodology of this study is based on secondary source of data, provided by INSTAT-Albania and The World Travel & Tourism Council (WTTC) from 2000 to 2013. The used information will help to understand better what has happened to Albanian Tourism. The objective of Tourism statistics is to publish statistical information with quality over Tourism and harmonized with European standards according to directive of Council Nr.95/57/EC over gathering statistical information in Tourism branch. In this study, we based on important statistical indicators through which it is to be clearly expressed the way that Tourism in Albania has attended.

The statistics of Tourism are treated in two directions. One direction is the capacity and frequency of accommodation units and on the other side there are entries and exits of citizens, whether foreign or Albanian according to border points and means of transport, entries of foreign citizens according to purpose and state.

**Table 1** Arrivals of foreigners by means of transport (in thousands), Albania 2000–2013

	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Total	317	353	470	558	645	748	937	1126	1419	1856	2418	2932	3514	3256
By air	72	90	80	87	103	128	150	182	206	227	246	267	273	314
By sea	79	102	111	120	138	130	141	162	189	215	216	191	180	182
By land	166	160	279	351	404	490	646	782	1024	1414	1956	2474	3061	2760

Source: INSTAT



**Table 2** Arrivals of foreign citizens according to regions (in thousands), Albania 2000–2013

	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Total	<b>317,149</b>	<b>354,000</b>	<b>470,574</b>	<b>558,057</b>	<b>645,409</b>	<b>747,837</b>	<b>937,038</b>	<b>1,126,514</b>	<b>1,419,191</b>	<b>1,855,634</b>	<b>2,417,337</b>	<b>2,932,132</b>	<b>3,513,666</b>	<b>3,255,988</b>
I. Africa	244	66	75	233	174	174	220	319	317	211	3193	432	1057	919
II. America	13,977	13,596	15,790	18,895	25,519	34,816	42,241	51,881	60,978	59,945	61,878	70,291	73,810	73,291
III. East Asia and Pacific	1932	2035	2901	3805	4288	5444	7592	9674	15,419	28,433	11,361	17,418	19,689	23,628
IV. Middle East	1439	1074	752	896	775	837	1068	1262	1115	1313	1247	1178	1524	3944
V. South Asia	355	309	351	424	410	354	376	376	484	661	764	909	1135	961
VI. Europe	<b>295,149</b>	<b>320,477</b>	<b>439,151</b>	<b>531,927</b>	<b>609,821</b>	<b>703,205</b>	<b>857,358</b>	<b>1,060,975</b>	<b>1,335,227</b>	<b>1,512,734</b>	<b>2,238,958</b>	<b>2,738,846</b>	<b>3,214,111</b>	<b>2,963,583</b>
Central/Eastern Europe	6533	7021	7779	11,139	15,073	22,319	30,171	52,589	60,038	60,880	63,722	82,418	90,643	112,333
Northern Europe	14,810	20,599	28,778	32,905	39,578	44,829	61,426	68,655	79,553	79,931	85,463	109,924	117,434	119,016
Southern Europe	238,347	255,719	360,006	440,437	498,948	564,333	681,084	830,802	1,058,063	1,220,254	1,912,383	2,320,746	2,759,374	2,467,195
Western Europe	26,195	27,266	32,240	37,267	44,206	56,271	69,147	85,207	101,616	116,030	141,187	186,531	200,462	210,845
East/Mediterranean Europe	9264	9872	10,348	10,179	12,016	15,453	15,530	23,722	35,957	35,639	36,203	39,227	46,198	54,194
VII. Other countries not specified	4053	16,443	11,554	1877	4422	3007	28,183	2027	5651	252,337	99,936	103,058	202,340	189,662

Source: INSTAT

Bold values indicate the total of European countries

**Table 3** Arrivals of foreigners and Albanians in hotels (in thousands), Albania 2000–2013

	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Total	165	170	171	111	75	113	130	171	212	236	255	318	250	223
Foreigners	32	34	36	61	34	57	63	67	56	65	74	136	150	118
Albanians	133	136	135	50	41	56	67	104	156	171	181	182	100	105

Source INSTAT

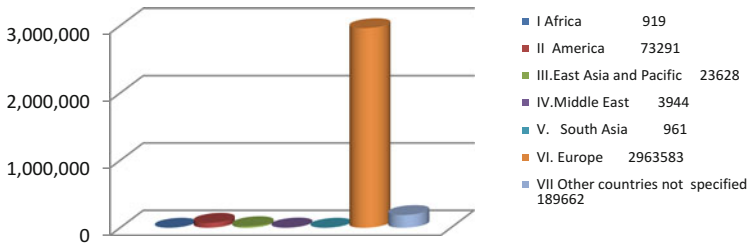


Fig. 1 Arrivals of foreign citizens according to regions, Albania 2013 (INSTAT)

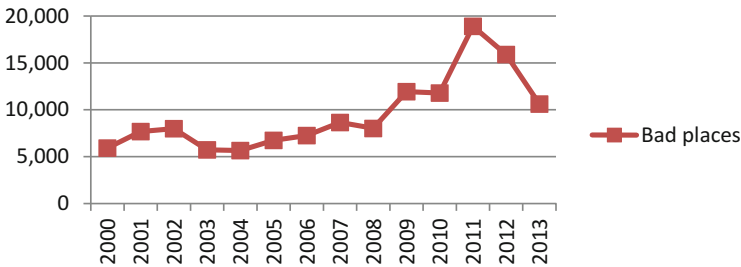


Fig. 2 Hotels capacity, Albania 2000–2013 (Source: INSTAT)

If we would refer to Table 1, the number of incomers in Albania has had a considerable increase from 2000 to 2013. Moreover, if we would refer to their spread, according to the way of their travelling choice, the largest part of them have chosen terrestrial means. Foreigners that landed in our country are mostly from European region rather than others. This fact is also presented in Table 2. In 3,255,988 people, 2,963,583 of them were from Europe, especially from South Europe (2,467,195 people).

From the data represented in Table 3, it is clearly seen that during 2000–2013 there has been a positive trend in the number of incomers in Albanian hotels. In 2000, there have been only 32,000, whereas in 2013 there have been 118,000. For each year, there has been a greater flow of foreigners in Albanian hotels (Fig. 1).

The capacity of Albanian hotels has had an increase from 2000 to 2013 as it is represented in diagram of Fig. 2. The above analysis of data reach the conclusion that: we have a significant increase of Tourism sector in Albania, as far as the period 2000–2013 is concerned.

#### 4 Cultural Tourism in Albania

Cultural Tourism in Albania as a profitable activity by making use of cultural monuments, functions for a long period (Xhaja, Xhaja, & Xhaja, 2013). Albania has an excellent Tourism development potential. Many cultural resource attractions

**Table 4** Visitors in cultural attraction 2008–2013

Visitors	2008	2009	2010	2011	2012	2013
Foreigners	94,142	253,002	291,542	265,103	1,301,479	245,703
Albanians	65,347	81,991	93,716	107,836	131,254	109,771
Total	<b>159,489</b>	<b>334,993</b>	<b>385,258</b>	<b>372,939</b>	<b>1,432,733</b>	<b>355,474</b>

Source INSTAT

are of very high quality and would likely welcome high numbers of tours if they were more widely publicized within target populations (Marku, 2014). Archeology, inheritance and culture are identified as strong general aspects of Albania in different studies carried out with visitors and travel industry by foreign markets.

The figures of foreign west tourists that visit cultural attractions, even with an increase of 15–25 % per year, are very low (2008–2012); in 2013 they have had a considerable decrease in 109,771 tours. Meanwhile, the exhibition of Skanderbeg sword and his helmet in National Museum in November 2012 attracted a large number of 950,000 of local visitors. Table 4 gives an overview of the tours from local and foreign tourists in cultural attractions. Being as important as the geographic-natural offer, cultural property has the advantage of being non-seasonal; convenient to be visited throughout the year. Some main issues represent the potential of Albanian cultural property:

Archeologic sites and objects which bear evidences of ancient residence and development of our country. Such sites are: Butrinti, Apoloni, Dyrrah, Antigone, Bylis, Amantia etc. as well as many unique archeologic objects found everywhere in our country. These sites and objects represent a special attraction to many tourists, whether local or foreign ones. In historic settlements, there are found basilics, the most important of which are: large basilics of Butrint, basilics of Arapaj, Bylis, Finiq, Durres which are interesting to be visited. Basing on these values, many of them are transformed into monumental centers under government protection and there are even those such as Butrint which is under protection of UNESCO, while Butrint and its surroundings, because of its archeologic and natural values, are declared National Parks.

Castles and fortresses throughout Albania territory, which belong to Middle Age period, serve as witnesses of Albanian peoples' resistance against foreign invasions. Such objects are numerous in Albania but remain to be emphasized such fortresses: fortress of Berati, Gjirokastra, Kruja, Shkodra, Petralba, Stelush, the fortresses of Ali Pashe Tepelena in Tepelena, Libohova, Porto Palermo, the fortress of Petrela etc. Thus holding an important place in touristic itinerary in Albania by various tourists that pay considerable interest in knowing their history. Some of these fortresses (Berat, Kruje, Shkoder) create great possibilities of visiting them at any time and revealing evidence of their history and residents.

Cult objects in our country such as: churches, mosques, small mosques etc, despite their religious importance, represent interest to be visited by different foreign and local tourists. These objects bear their existence thanks to three main religious beliefs (Islamism, Orthodox, and Catholicism) and they are a good

indicator of how different religious beliefs can co-live in peace. Tourists can visit these cults, without the slightest problem, knowing in this way their specific architectures, construction history and function as well.

A great number of churches are decorated by works of the greatest Albanian painters such as David Selenica who painted the church of Saint Nikolle in Voskopoje, brothers from Korca Kostandin and Athanas known for their works in Korçe, Myzeqe. Kostandin Shpataraku is known for his works in miniature of icons. The mosques: Muradies (Vlore), Mosque of Lead (Berat), mosque of Ethem Bey (Tirane) etc, are also known.

Ethnographic objects of culture, residence and living in Albania cover almost every region, even villages and cities and they offer their peculiarities of different ethnographic objects: of living, dressing, feeding etc. All these objects constitute at the same time important motifs of touristic movement to know, study and experience them. Tourists show special interest on the way of dressing, the study of lifestyle and food in general of different regions around the world. Meanwhile, the countries or regions that possess their depictions in this field, take advantage on them in order to attract as many tourists as possible. Based on this importance, there are trades, museums or fairs, which generally and in organized manner present to tourists different ethnographic objects that the culture of a country or a specific geographic region offers.

## **5 The Factors that Affect the Tourism Development in Albania**

Albania has a favourable geographic position because it is situated in the crossing of the shortest roads that pass from West Mediterranean to Balkan and Small Asia and it controls the passing through sea channel of Otranto. Geographic position as a geographic-natural offer, plays an important role in Tourism development of a country and especially of Albania where other elements such as relief, climate, waters, flora and fauna and historic-cultural objects, constitute the primer touristic potential.

Nevertheless, Albania has some problems in infrastructure as well. Recently, there have been great investments in roads but investments in roads and electricity have not yet been completed according to requests of time to have an advanced and elite Tourism.

The sector of Tourism in Albania proceeds under the existence of favourable and non-favourable conditions. In order to have a clearer idea about this topic, we will identify some of the main factors that define these conditions, both those with positive and negative effect.

- The factors that have positive effect in the progress of Tourism sector in Albania are: the favourable geographic and touristic position, vast coastal line, magnificent natural landscape, archeologic property, ancient cities, Albanian's

hospitality, young population, the high percentage of working force, high level of education, mastery of foreign languages, integration of Balkan countries and soon the integration of Albania in European Union, the progress of information technology, etc.

- The factors that have negative effect in the progress of Tourism sector in Albania are: the difficult conditions of infrastructure, uncertainties in the legal framework, the backwardness of the country, the continuous problems of property, improper management of touristic centers, welcoming areas with inappropriate conditions, the memorandum of speedboats despite the security of trafficking also affect the traditional Tourism “sun and sand”, global crisis, dependence of Tourism on foreign capital, lack in touristic competition within the country, strong competition with neighbouring countries and further ones, political insecurity that often threatens the country and region, etc.

## 6 Conclusions and Recommendations

The main purpose of this study was to present the progress of Tourism in our country and its importance in the economy. The sector of Tourism in Albania appears in its all spectrum such as the coastal, mountaneous, cultural, curative Tourism, etc. Through statistic data, we represented the positive trend of the increase of this sector during 2000–2013. The number of tourists that had visited Albania during this period had been more and more increasing. The largest part of them had been from South Europe. An important part of the study was dedicated to cultural Tourism and all its characteristics. Various advantages accompany the cultural Tourism in Albania such as geographic position, cultural, archeologic and historic property, etc, which have been mentioned during this study. However, the further growth of this sector and competition with other countries is prevented from a number of factors: weak infrastructure, lack of investments in this sector, economic crisis along with decrease of remittances, etc. In order to have a sustainable development of Tourism in Albania, a number of measures have to be taken.

Improvement of accommodation offered in main cultural destinations. The capacity of structures with three or four stars increases through improvement of existing structures and construction of new hotels, growth of small, traditional and rural structures in cultural destinations.

Increasing of investments in infrastructure, marketing, human resources, management of natural areas, preservation of historic places, etc is to be considered.

Products must be authentic Albanian to make a difference from our neighbours.

It must also be considered the creation of practice of regular appointments from interested parties, administration and interested people to discuss the issue of Tourism in cultural destinations.

Establishment or improvement of structures such as: The Touristic Information Center (TIC).

The creation and commitment of training and certification system about touristic guides and guides in touristic points that must be planned.

Activities must be planned, necessary measures and investments that each touristic attraction and cultural offer to accomplish the required standards and willingness to enter the trade.

The composition of instruments and measures in supporting investments, such as specific conditions of credit, direct financing in profitable investments of facilities, specific conditions in supporting the business of Tourism must be intended.

The improvement of marketing and sale, the creation of characteristic trades with local products, the support of relation between businesses of Tourism and local products must also be taken into consideration.

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# Archaeological Rock Art Landscape of Northern Patagonia

Mónica Beatríz Gelós

**Abstract** The territory that Patagonia comprises offers an important variety of landscapes. To proceed to its analysis, we will approach the landscape that refers to rock archeological heritage; hence we will talk about “rock art archeological landscape”. For this, we will build the project on the Convention of World Heritage, which in 1992 in its 16th Committee session established in its 1st Article the term “cultural heritage”.

Thus, in 2005 the Operational Guidelines that contemplates the subcategory of fossil cultural landscape was established, under which our subject of study would be circumscribed. Moreover, in November 2012, the contestants of the 2nd Cultural Landscape Encounter which took place in Cartagena de Indias, Colombia, elaborated the “Spanish American Letter of Cultural Landscape”. Being the aim of this letter: “to grant value to the resources that Spanish American cultural landscapes treasure and that are at the service of local development and, at the same time, of improving the quality of life of its inhabitants”; this is the letter to which we will circumscribe.

Recent years have been characterized by the development of an interesting variety of projects carried out with the communities within provinces of Patagonia, aimed at the local development as a means to improve their living conditions. In that sense, it is that we will approach the subject of rock archeological landscape of the north Patagonia, more specifically in Neuquén province. In it there can be found trace that correspond to its prehistoric moment, having as main representatives an important quantity and variety of archeological sites with manifestations of rock art. A specific case is one called “Colomichicó” (the biggest site of engraved blocks outdoors in Latin America) around which the first Archeological Park in the province has been organized.

**Keywords** Archaeological landscape • Rock art • Northern Patagonia • Tourism

**JEL Classification** Cultural landscape and tourism

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## 1 Introduction

Our study area belongs to the Transitioning Andes system and it is composed by two parallel ranges: the range that forms the boundary, which divides the waters, though it does not contain the major heights and the pre Andean formation separately located by the Neuquén river basin.

This current topography originated in the tertiary period (90 million years ago, approximately) and with it the process of elevation of the Andes Mountain Range concluded, which forces the sea to a constant regression and it imposes the region its distinctive plateau landscape. This area is part of the “Cuenca Neuquina” (Neuquén basin), whose sedimentary accumulation corresponds to Jurassic and Cretaceous periods, secondary era (80 million years ago). History of the settlement in Patagonia in its prehistoric period has its beginnings about 12,000 years ago. According to archeological data, in that moment men coexisted with Pleistocene mega fauna (mastodons, mylodons and American horses) and he had a way of life based in animal hunting and gathering of wild plants and fruit. These lifestyles persisted with some adaptations until the time of the contact with the “white man”. The groups who inhabited northern Patagonia were the upstate Tehuelches. Their wide knowledge of the resources (animals and vegetables) made them travel seasonally searching for those food sources.

In this territory there might have existed an incipient regionalization according to the use of a wide number of natural environments and of the seasonal and reproductive cycle of the guanaco, considered a leading resource. We accept that human groups are in a geographical ambit where relationships and activities are developed among their members (internal) as well as with other communities (external) without leaving the surrounding ecological environment aside. The settlement sites cover a wide geographical distribution among all provinces that form the Patagonian region (Neuquén, Río Negro, Chubut, Santa Cruz and Tierra del Fuego).

The lithic materials found from that moment are triangular projectile points, scrapers, needles and bone awls, etc.

From the contact with the Spanish man these societies experience changes in their traditional ways of life through the incorporation of the use of horses (for mobility and as an exchangeable good) and the beginning of the use of European species such as cows and sheep. This caused the transformation of hunter-gatherer communities to livestock and trader communities; activities that are still being developed today.

On one hand, the landscape environment of the study area has a specific esthetic value. On the other hand, it also constitutes a precious natural resource formed by multiple elements or components that contribute to stimulate the interest of visitors. Currently there is a growing demand from travelers to meet sites of cultural relevance where an element is not seen as an isolated case, but within a context that contains it and gives it meaning. This new condition of the heritage, considered

now a touristic product, highlights the need to develop actions that guarantee its protection.

Our work takes an interest in considering both aspects, but it also takes an interest in its preservation (meaning the maintenance of harmony as a system in which local people have a fundamental role when thinking about the recognition of the value that this cultural landscape has). Example of this is the development from February 2015 of the Management plan for the Cultural Landscape of the Middle and Lower Paintings River Basin, in Santa Cruz province in which surrounding communities have a wide participation.

This work is developed in the environment of the Cultural Resources professorship, dependent on the Department of Touristic Resources of the Faculty of Tourism, National University of Comahue of Neuquén and Río Negro provinces. This project will approach the subject of cultural landscapes, considering that the diverse cultures leave their mark in the territory creating layers from which it is possible to start revealing the history of how they developed in it. The landscape is fundamentally information that humans receive from their natural environment. Therefore, we consider that the traces of cultural heritage belonging to that moment in the prehistoric Patagonia in which (traces) men had a close relationship with its surrounding environment (rock art manifestations, archeological material, etc.) are one of the most visible material aspects, which allow us to interpret the evolution of the surrounding landscape related to its cultural aspects, and they allow to establish which its potentiality from the point of view of tourism management beyond interventions already made. Based on the wealth of experiences, information and worked methodologies, we will try to continue to articulate the construction of management models through which local communities are able to identify the relationship between heritage symbols and the community and its recreational and productive possibilities. It is also intended to collaborate in the establishment of strategies for the awareness, preservation and diffusion of Northern Patagonia heritage resources.

## **2 Literature Review**

### ***2.1 Current State of Knowledge on the Subject***

During the 50s decade UNESCO, from policies of protection of cultural property and with the development of the concept World Heritage, contributes to the "Tourism versus Heritage" problem. Although tourism used to be considered as an activity that could have negative effects in terms of conservation, the appearance of the term Cultural Tourism softens that conception. That is why cultural tourism or, heritage tourism, used to be considered as a type of tourism that considered the conservation of monuments. In 1972, the Convention of World Heritage arises, which did not contemplate explicitly the issue of intangible heritage or the role of

the communities in the definition and management of its heritage, but a time later, the Convention on the Protection of the World Cultural and Natural Heritage makes reference to the value and the universal interest on its preservation.

It is in the year 1975, along with the creation of the World Organization of Tourism, when the idea of negative effects of mass tourism is considered, leaving aside the idea of tourism as a factor of economic development and its social and cultural issues begin to be observed. Then, in the year 1976, the ICOMOS Letter of Cultural Tourism poses the following as its major concern: the preservation of the universal value of the heritage without mentioning the local villages or tradition-bearers, and only referring to the public in general and to the tourists. On the other hand, the new ICOMOS Letter of Cultural Tourism from 1999 propounds a new definition of heritage, wider than the previous one, mentioning that it covers the notions of landscapes, biodiversity, regarding cultural practices it also mentions local people, indigenous people and host communities. Although implicitly, this letter alludes to the notion of intangible heritage and it recognizes the population as a fundamental factor of assessment and safeguarding.

The sustainable management of cultural heritage as an instrument of development, relating the actions over it not only to the cultural sphere, but also to the economic and social aspects, can contribute to the improvement of the living conditions of the population, promoting opportunities and capacities of the communities as essential elements of sustainable human development. The set of planned actions with the purpose of reaching its conservation and adequate use will also favor the development of cultural capacities and the preservation of the identity and the cultural diversity, ineludible components of integral human development. That is why from the diverse views with which it is possible to approach the heritage, the holistic one is the chosen one, which considers heritage as evidence of the identity of people and it contemplates itself as a resource for a sustainable development. In the particular case of archeological heritage, which is heritage property and which can be put in value from management policies in order to incorporate it from the implementation of a management plan to the productive sphere for the benefit of local people within, for example, programs of tourism of special interests, we will say that it is potentially a resource with an economic assessment (Ratto, 2013). Within the categories that integrate the concept of cultural heritage, we will approach the one of cultural heritage considering that it is a complex reality, comprising natural and cultural components, tangible and intangible components, which combination configures the character that identifies it as such (Committee of the Convention of World Heritage—UNESCO). Its complexity poses a type management composed by cultural landscape carried out not only considering the need for developing of the people that inhabits it, but also the need for protecting their identity.

Although there are various typologies of landscape, the one that interests us particularly is the type denominated as Organically Evolved Landscape, due to an initial imperative of social, economic, administrative and/or religious nature, and which has evolved to its current form as a response to the adaptation of its natural

environment. This process is reflected in different ways, so that two subtypes are set:

Fossil landscape is one that in its evolutionary process concluded sometime in the past, but its characteristic features are still materially visible.

Active landscape is one that has an active social role in the contemporary society, associated to the traditional way of life, and whose evolving process is still active.

Cultural landscape represents the efforts of generations of inhabitants which, shaping a way of settlement, influence every aspect of the life of a region. It is here where human presence is enhanced as an element that generates changes and also as a receptor of those changes.

From year 1992 the World Heritage Convention in its 16th Committee reunion acknowledged cultural landscape as the “combined works of nature and human kind” designated in the 1st Article of the Cultural Heritage Convention, encouraging various countries to approach this category of heritage. We have, hence, the European Territorial Strategy which includes cultural landscapes as part of cultural heritage of the European Union, which considers them an important economic factor for sustainable development, and which establishes a series of policy options for what they denominate the “creative management of cultural landscapes”. Continuing with this perspective, the Principles for Sustainable Territorial Development in the European continent of the Council of Europe (Hannover, 2000) also acknowledge cultural landscapes as a significant part of the European heritage; they incorporate the objectives of the European Landscape Convention and add the contemplation of landscape in international programs and in cross-border, transnational and interregional cooperation in matter of landscape (Spanish National Plan of Cultural Landscape, 2012). In Italy since 2004 there is the Code of cultural goods and landscape; in Spain, the Landscape Protection Act of Galicia 2008; in the UK the Historic Landscape Characterization program defines a methodology for the study of historic landscape; in Switzerland there is the Project carried out by the Federal Office for the Environment; Forests and Landscape, which defines the landscape policy for the following Paysage years 2020; in Germany, a web page Interaktiver Landschaftsplan (Interactive Landscape Plan) dedicated to development of landscape plan in the city of Königslutter am Elm, and which is an interactive project in which citizens are able to participate; among others.

In the case of Latin America, we have the Spanish American Letter of cultural landscape elaborated in Cartagena de Indias (Colombia) on instances of the 2nd Encounter of Cultural Landscapes, being one of its purposes to boost a Spanish American web of cultural landscapes with joint initiatives that conduct to good practices, the coordination of actions of the various agencies of the states involved, the integration and the development of Latin-American zones or regions committed to cultural and landscape heritage. In Colombia the government promotes the Coffee Cultural Landscape; in Argentina we can mention the case of “La Quebrada de Huamahuaca”, in Jujuy province, which was designated Protected Landscape according to provincial law N° 5260 and which constitutes the antecedent used by the national and provincial government to carry out the management for its

declaration as World Heritage by UNESCO. It is this way that the Quebrada de Humahuaca received this nomination in July 2003. If at first the Quebrada was submitted to a global terminology (through its declaration as protected landscape) for its, mostly ecological, preservation, now it is transformed into an object of protection (through its acknowledgement as World Heritage) in virtue of an also global conceptualization but which puts the role of culture in its constitution in evidence. Therefore, the Quebrada de Humahuaca was included as World Heritage under *cultural landscape* category, established by ICOMOS from documents elaborated by this international institution since 1992. Within the typology of landscapes set by the Operative Guide, the Quebrada de Humahuaca would be considered an evolutionary landscape (or organically developed). Moreover, the promotion of Argentinean cultural landscapes conducted by the National Ministry of Tourism should be taken into account, since in its web page exponents from different regions of the country are mentioned.

In the case at hand, northern Patagonia, it is a landscape inhabited, productive, alive and dynamic, which stands out for the culture of the ancestors of those who live there today as well as for the particular culture of its people, in themes that go from archeology, architecture and gastronomy to popular festivals. The interaction between the inhabitants and their surroundings allows us to have a systemic perception built from the landscape evidence and the subjective assessment of individuals, indissoluble part of this landscape, whose study and interpretation are fundamental for the establishment of management policies in landscapes of touristic value.

Cultural policies are crossed by ideologies and institutional issues that will have different characteristics within a village, region or country and they will be the sustenance/livelihood of the management actions to follow in which investigation, conservation and diffusion are the main objectives. These management actions must be circumscribed in the paradigm of sustainability which implies economical growth, environmental conservation and social equity.

Countries like Australia, France and Spain are the ones that lead in terms of implementing plans of management, which in more than one case have derived in programs of integrated heritage management. In the case of our country, we will say that we are in the development stage of those programs.

It must be acknowledged that cultural heritage is closely connected to natural heritage, since it cannot be conceived decoupled from its environment to the point that in 1992 it consolidates and establishes a new category as cultural landscapes are, so complex and enriching, which is incorporated to the World Heritage Operational Guidelines.

This allows a reading of the territory linking traditional knowledge with the adoption of new technological models, setting a landscape characterized by its natural surroundings, ways of territory occupation and every cultural and social manifestation developed and, in that, the overlapped changes that set the current cultural landscape of northern Patagonia, interacting in each of its moments: prehistoric, ethno historical, colonization of white man and its current population conformation.

The interest to visit rock art sites and the lack of control generated a series of damage due to human presence (vandalism, new process of deterioration, etc.) which determined the need to establish guidelines related to the conservation and administration of these highly fragile sites. Thus, from the 60s decade and later in the 80s and 90s there are many studies and associations related to its conservation.

Countries that are forerunners in the studies of rock art conservation are France and Spain. The most famous example is Lascaux Cave (south west of France), which after taking in visitors for more than 20 years had to be closed down due to the appearance of accretions called “white and green diseases”. This case caused commotion within the scientific community and sensitized the public opinion to heritage protection.

Many countries such as Australia (Kakadu National Park; Uluru National Park, Laura—Split Rock—Carnarvon Gorge—Cathedral Cave; Paroong Cave, etc.), Canada (Peterborough—Petroglyphs Provincial Park; Mazinaw Lake Bon Echo Provincial Park; etc.) and USA (Petroglyph National Monument; Irish Canyon, etc.).

Portugal, with the case of PROCÔA (Integral Development Program of Valley of Côa), constitutes one of the best and clearest examples of the implementation of plans of management integrally handling this heritage, incorporating a very good policy of access to the site, considered the biggest opencast site in Europe with great rock art manifestations (petro glyphs).

This way the Regional Management Union, supporting PROCÔA Coordinator, is constituted by: the Coordinator himself, the manager of Program for Promotion of Regional Development Potential, the director of Côa Valley Archeological Park and a representative of each of the municipalities involved.

PROCÔA is an undertaking which involves nine municipalities and which was created so that essential conditions for socio-economical development of Côa Valley were combined.

The main target is to create jobs, invigorate the region and fight desertification and to promote people location.

One of the primal goals of PROCÔA is, without doubt, the creation of Côa Valley Archeological Park. This initiative is responsible for the generation of a major part of the investigations and wealth, not only through activities directly linked to part of archeology, museum patents, investigation center and reception center, but also through traditional activities of the region which contribute to diversify its bases and living conditions.

These countries were the founders of organizations specializing in the subject, for example the Canadian Conservation Institute, Getty Conservation Institute, American Rock Art Research Association, Australian Rock Art Research Association, etc. (Podestá, 1996; Taboada, 1998).

In Latin America projects of conservation and administration of rock art sites have begun to be developed. The most prominent is located in Mexico (Sierra de Baja California—designed by Stanley Price); then there is Brazil (Sierra da Capivara—under the responsibility of Pessis) and Bolivia (Batea Cocha—Torotoro—promoted by SIARB), as well as Chile, the geo glyphs of Azapa Valley.

In Argentina the following records related to management plans of rock art sites are known: nationally, within the Program of Documentation and Preservation of Argentinean Rock Art (its acronym, D.O.P.R.A.R.A.) initiated in 1995 (Rolandi Perrot; Gradín; Aschero; Podestá; Onetto; Proaño; Wainwright y Helwing). There have also been developed management plans for other sites such as Cueva de las Manos and Cerro de los Indios (Santa Cruz) and the sites nearby the town of Antofagasta de la Sierra (Puna Medirional Catamarca); and the Comarca Andina del Paralelo 42 (the Andean Region of Parallel 42) (Podestá y Bellelli, 1995; Rolandi, Bellelli et al., 1997).

Recent work are being developed in La Pampa province as Valley Quehue Region, Cueva Salamanca (Salamanca Cave) (Gradín, 1975); Lihue Calel National Park (Gradín, 1975; Molinari, 1994–97).

In Chubut Province it can be found the Project of Conservation and Management on eaves in Los Alerces National Park carried out by María Soledad Caracothce and others; conservation and public use of Roca Lake in Los Glaciares National Park (Santa Cruz province), initiated in 1999 by María Soledad Caracotche and Claudia Manzur.

In another province such as Córdoba, we can find Cerros Colorados Archeological and Natural Park (Boelle, Weber, Wypyski, & Charola, 1995).

In Neuquén province, located in northern Patagonia Colomichicó Archeological Park is being run, which allows controlled access of visitors (Vega, Gelós, Bestard, & Marzari, 2000).

### **3 Methodology**

#### **3.1 Objective**

To characterize the cultural landscape of northern Patagonia from de identification and valorization of its archeological resources, to favor local development.

Activities for the objective

1. Identification of archeological sites
  - 1.1. Visit, registration and documentation of archeological sites with rock art and its landscape surroundings.
2. Work with the communities.
  - 2.1. Identification of the communities which represent cultural heritage.
  - 2.2. Creation of workshops of sensitization among the members of the communities that convey cultural heritage.
  - 2.3. Realization of training on cultural heritage.
  - 2.4. Survey of tangible and intangible cultural heritage (architecture, sculpture, local activities, parties, gastronomy, historical sites, myths, legends, costumes, etc.) that historically identifies the communities in shaping the landscape.

- 2.5. Survey of state organizations and communal associations related to cultural heritage and community participation.
3. Interviews to key informants.
  - 3.1. Interviews to former inhabitants.
  - 3.2. Interviews to people who raise their animals practicing seasonal breeding (veranadas e invernadas).

## **4 Results**

### ***4.1 Expected Results***

Since the present project is still developing, we will enunciate the expected results below:

That this project contributes to the conformation of an interdisciplinary team, including students, orientated to the approach of cultural heritage, to its esthetic and historical value, its conservation and management; to continue seeking curricular incorporation of the worked topics so that the awareness has institutional space in schools, colleges and teacher training institutes and that the input consists of the conformation and counseling of local teams for the approach of heritage legacy and its recreational and touristic possibilities.

It will be procured to progress in the current state of the knowledge through establishing basic conceptualizations in the form of a theoretical-methodological proposal for the integrated management of archeological heritage; susceptible to being a referent for the management and conservation of others sites indifferently to its location.

This work will allow the transference of new knowledge to the Professorship of Cultural Resources I and II of the Degree in Tourism; Professorship of Cultural Heritage I and II of the Major in Tour Guide, the Professorship of Regional Cultural Heritage and the Degree in Management of Tourist Service Companies in the contents and implications of the preservation, conservation and management of the Cultural Heritage in general and Patagonian Prehistoric Heritage in particular.

Our purpose is that the information generated is useful to elaborate a policy of rational protection of the resource and that this is incorporated to the projects of identity rescue and of Patagonian Cultural Heritage, considered of interest in the studies of the conformation of its population.

This project aims to give continuity to the mentioned aspects, pretending repositioning the regional economy from the revalorization of the cultural heritage of the area and its conservation considering the recreational touristic activity.

Together with the provincial culture institutions this project will complement regional archeological investigations that these entities develop and the results will be incorporated to the instances of dissemination of cultural heritage through diverse publications, television programs, video footage, etc. Furthermore, we



pretended to build workshops on the implementation of the management model which provides tools for the community to be active as well as making an input to educational institutions through spreading materials (documentaries, interactive CDs, videos, brochures and radial and television programs.)

The incorporation of the “Rock Art” theme to crafts, the development of traditional productions and regional gastronomy diversifies the production expanding the offer to local services. Hence, this contributes to the regional development.

In another ORDER, the previous articulations will contribute to municipal states with elements for the design recreational public policies linked to the use and enjoyment of the cultural heritage.

On another hand, the documental file (both visual and written or electronic) will be the basis for further studies creating also possible documentation and study centers.

## 5 Conclusions

Even though the current project is still being developed, the works hitherto carried out allow us to affirm that we have contributed to human resources education, from the training of local residents for the appropriation and use of their cultural resources for tourism development. It has been initiated a process of awareness of local authorities and technicians of governing bodies for the purposes of implementation of state policies considering these resources. The Provincial Boards of Education also made these trainings, several of which work in relation to cultural heritage and regional products, have been made.

The work with some communities of northern Patagonia allowed the awareness and to initiate the development of strategies for the management of cultural heritage, recreating and allowing the appropriation of rock art of the area with techniques learnt in different courses-workshops dictated with that goal. From this, a change began to arise in the local productive sector, evident en in new and different products related to the theme (textiles, ceramics, and candles, among others) and generating, hence, new alternatives to the regional economy.

# Museums: From Cabinets of Curiosity to Cultural Shopping Experiences

Elizabeth Booth and Raymond Powell

**Abstract** The evolution of the museum in society has been extensively considered in both the museums and marketing literature. Museums began life as private collections assembled as spectacles for the benefit of a chosen few ('cabinets of curiosity'). Over time, in response to changes in society, a broader vision of their role evolved, anchored in ideas of public benefit and community engagement with common cultural heritage. Organisations such as ICOM (the International Committee on Museums) have been established (1946) to monitor and regulate approaches to their management worldwide.

Scholarly and custodial functions are now rooted at the heart of the museum, but museums have also gradually embraced an outward perspective towards the visitor. Since the 1990s visitor experience, education and entertainment have become embedded into general mission statements alongside the more traditional curatorial roles. The theme of evolution in museum role is perennial and leads to the consideration of current trends and changes in its emphasis.

As cultures of consumption have increasingly become pervasive in Western society, and economic constraints have led to cuts in Government funding of culture, the UK's nationally-funded museums have now become adept at generating income from trading and other sources. An emergent strand of literature suggests that alongside the—now, in the main accepted—visitor focus of museums, is the idea of the future of the museum as a 'cultural shop', implying a growing organisational orientation towards income generation. The parallel perspective on museums as part of the economic infrastructure, valued for multiplier effects related to tourism, leads to the central theme of this work—how is the increasingly commercial role of the museum influencing its visitor provision and hence its relationship to its publics?

The paper will provide an overview of the role and evolution of the museum to date prior to considering the development of role and function in one of the UK's leading nationally-funded museums, London's National Gallery. This museum is one of the UK's flagship visitor attractions, the second-best attended in the country. A content analysis of visitor provision will be undertaken and the conclusions

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related to a framework based on visitor profiling, to try to understand how trading outlets and paid interpretation is currently influencing the museum product and its audiences.

**Keywords** Museum management • Museum orientation • Visitor experience • Income generation • Museum interpretation

**JEL Classification** M14 • Corporate culture • Diversity • Social responsibility

## 1 Introduction

The evolution of the museum in society has been extensively considered in both the museums and marketing literature. Museums began life as private collections assembled as spectacles for the benefit of a chosen few ('cabinets of curiosity'). Over time, in response to changes in society, a broader vision of their role evolved, anchored in ideas of public benefit and community engagement with common cultural heritage. Organisations such as ICOM (the International Committee on Museums) have been established (1946) to monitor and regulate approaches to their management worldwide.

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## 2 Literature Review

This literature review will first examine the directions and implications of museum definition, then consider arguments relating to the function and purpose of museum and developing organisational orientations. The frameworks of income generation and its related terminology as practiced in the UK nationally funded museums will be explored, and there will be a broad look at general issues of visitor behaviour before a discussion of the research setting and method.

## 3 Museum Definition

Museums occupy a unique place in society. As custodians of our culture and heritage, they hold a position of responsibility in recording, representing and determining our awareness and understanding of our past and present. Through their relationship to collections of art and artefacts they possess the means to analyse, interpret and re-interpret the past; through their relationship to visitors to disseminate ideas and to encourage curiosity and understanding. The role of the museum is in constant evolution—Rentschler (2007, in Rentschler & Hede) has described the transformation of museums from a ‘product’ to ‘market’ orientation, while elsewhere the dichotomy between scholarly and visitor management missions are reflected on by such authors as Merriman (1991), and Hein (2000).

Museums are heterogeneous organisations—no two are the same. Definitions tend to focus on the general function and purpose, embracing a broad perspective rather than a particular description. Ambrose & Paine’s (2006, p. 6) description of museums as ‘treasure houses of the human race . . . they store the memories of the world’s peoples, their culture, their dreams and hopes’ provides an overview of the intellectual and, possibly, emotional significance for some, if not a grounded view of their function. It provides scope for an imagining of the variety and diversity of museums and their collections. If museums are repositories of cultural memory, dreams and hopes, then surely their physical embodiment must be as rich and colourful as the histories and traditions that their collections represent. Their evolution will reflect a variety of different influences and environmental factors. Museum definition thus changes across dimensions—as directed by their local environment and tradition, as well as over time.

Beginning with an international viewpoint, the International Council of Museums (ICOM), a non-governmental organisation with links to UNESCO, proposes the following definition (2007):

a non-profit, permanent institution in the service of society and its development, open to the public, which acquires, conserves, researches, communicates and exhibits the tangible and intangible heritage of humanity and its environment for the purposes of education, study and enjoyment.

This definition recognises the importance of a museum's collections, scholarship and visitors; it also points out specifically that a museum is a non-profit organisation. This relates to ethical concerns to do with the status of museum collections as being held in trust for society, and thus to be protected from commercial concerns such as divestment and deaccession; it sets the scene of museums as organisations where commercial gain and money-making may be considered to be risky and to run directly against the grain of the custodial mission. It also presages more local descriptions that embrace universally accepted dual emphases of visitor and collections, but which are increasingly moveable feasts as national organisations and academics debate the changing role of museums and as museums themselves face the rigours of an ever-changing social—and, particularly in this case—funding environment.

In the UK, the Museums Association (MA) (1998) definition shows a significant nod towards the acceptance of museums as both visitor experience and cultural custodian.

Museums enable people to explore collections for inspiration, learning and enjoyment. They are institutions that collect, safeguard and make accessible artefacts and specimens, which they hold in trust for society.

Hudson in Kotler and Kotler (2000) suggests that the shift towards visitor represents a universal change in the concept of a museum towards an organisation that exists to serve the public. Stephen (2001) and Anderson (1997a, 1997b) echo this idea in their assertion that museum function is linked to social good and lifelong learning.

A recent development is the recognition of the museum as a tool of economic transformation and as part of the tourism infrastructure. In particular, as the nationally funded museums in the UK offer free admission, their role in inducing multiplier economic effects is increasingly important to their status as funded bodies. Alongside this dimension have come expectations of the museum as a centre of income generation, leading to ideas that as well as the scholarly and visitor oriented roles, some museums are increasingly developing an income generation orientation.

If policy is considered to be one of the 'societal' changes mentioned here, the current state of the nationally funded (DCMS) museums in the UK has been subject to a significant shift in emphasis. Babbidge (2015) stresses that these museums are now viewed more as a part of the tourism infrastructure than as a tool for social change, education and inspiration. Baxter (2015) explains that this has led to some consternation as to the possible effects of 'mainstreaming' heritage, reducing it to 'nothing more than a commodity' (Hyslop, 2013, in Baxter, 2015, p. 34). The increasing pressure on museums to generate income in view of reduced levels of public funding has to an extent been a financial success; income levels of national museums have increased overall since reductions in public funding (Babbidge, 2015). McPherson (2006) presaged this with her description of museums whose 'market-oriented ideology' embraced income generation and new technologies as much as visitor engagement. McPherson suggests that museums have become

settings for leisure and recreational experiences. The visitor has transformed from 'spectator' to 'cultural shopper', with the museum setting the context for pre-purchase contemplation and gazing prior to the tangible experience of buying product in the museum shop. Kotler (2004) identifies this as a trend towards museums as providing sociable, recreational and participatory experiences. For most, he says, these dimensions of a museum visit are now more important than the educational or intellectual vision.

## 4 Museum Classification

The heterogeneity of museums presents problems of classification and hence trends in their development can be difficult to generalise. Museums can be classified according to the type of collection; the organisation who runs them; the area they serve; the audience they serve; the manner of exhibiting collections (Ambrose & Paine, 2006). In this paper we examine the organisational orientation of a museum whose collection of nationally important art leads to its identification as a 'gallery'.

## 5 Evolving Museum Function and Purpose: The Changing Environment

Traditionally, we have seen that most definitions of a museum (eg ICOM, 2007; MA, 1998) revolve around a functional description of their activities: the prosaic aspects of preservation, communication and scholarship. Their role as institutions for the public benefit and as custodians of culture are emphasised. Since the opening of the Ashmolean Museum in 1683 socio-cultural, political and economic forces have influenced museum function and the activity of collecting. Elias Ashmole's 'cabinets of curiosity' were collected for reasons of personal esteem and economic and intellectual advancement (Turner, 1985 in Impey & McGregor, 2001) but national museum collections today are considered to be part of a collective common heritage or culture, held in trust for society.

Wood and Rentschler (2003) argue that museums have dual roles: functional and purposive. Purposive relates to the people-focussed, communication role of relating cultural meanings to audiences while the functional role is about the internally focussed object based activities. Welsh (2005) identifies three domains of museum purpose: materiality, engagement and representation, thus highlighting the vital role of interpretation (linked to representation) and learning as a functional aspect of linking material collections with engaged audiences. Museum collections provide the unique core of interest and differentiate museum organisations from other leisure oriented activities; they usually, but not always, provide the motivation to visit. Falk and Dierking (2000) suggest that as society moves from an industrial to

knowledge economy, learning will become a new leisure attraction. Uzzell (1998, p. 16) elaborates on this theme, suggesting that ‘museums . . . can be seen as places where people come to understand themselves’. These words are compelling when one considers the importance of consumption to many people’s identity, and the implications that an income generation orientation has for the growth of consumption as part of the museum visitor experience.

There has been a growing recognition that the role of the museum is developing and changing in response to a changing political, social and economic environment (Van Mensch in Weil, 1990; Bryant, 1988 cited in McLean in Moore, 1997; Ames, 1989; Janes, 1995; Postman, 1996; Hein, 2002). Rentschler and Gilmore (2002) consider education to be the sole common thread linking most museum missions, but suggest that the organisational emphasis exists on a spectrum from custodial (preservation and scholarship) to marketing (temporary rather than permanent exhibitions, audience development and so on). Authors discuss the growing emphasis on entertainment rather than education (Hein, 2002) exemplified by a trend towards favouring temporary exhibitions over permanent displays, a de-emphasis of the value of the object in its own right and an experience that has become more conceptual, brought about by the influence of stakeholders on programming, including funders, trustees and the public. These changes are broadly considered to be detrimental to the value of the museum. Ames (1989) highlights the operational conflicts that can result in an unsatisfactory experience for a visitor who is seeking the opportunity for quiet contemplation, but finds an altogether different environment; Hein (2002) fears that museums will become just another experience, indistinguishable from theme parks. Goodman (1976) cited in Hein (2002) highlights the problems of diminishing the value of the original; the public become immune to the specialness of the original when exposed to too many copies of the same thing. Weil (1990) argues for the primary importance of the collection in museum purpose to provide benefit to the public by making the collection accessible.

## 6 Museum Collections and the Taint of Commerciality

If collections define what a museum is and distinguish them from other heritage organisations and leisure activities, the act of developing and selling heritage as a consumer product is considered in museums as a form of ‘commodification’ of values and objects relating to culture, history and identity (Hewison, 1991) and hence presents a challenge to the role of museums as custodians of material evidence. ‘Commodification’ is a loaded term in that it represents the transformation of cultural values to the commercial, centred in a world view that is rarely used in a positive context in heritage. Alexander (1999), on the other hand, suggests that commercial activity is not specifically damaging to a museum’s scholarly or custodial role, merely offers a route to offer culture to a wider public. Resistance

to the commercial stems from a fear of falling public subsidy rather than a deeply held suspicion of the taint of commerce.

The growing debates surrounding the role of museums in society reflect Bourdieu's (1984) considerations of the relationship between cultural supply and public taste. He suggests that public taste, as well as competing cultural originators, influence cultural output through a favouring of those most successful at appealing to current trends. While this may seem to indicate the power of cultural democracy through the popularisation of culture, Bourdieu warns that the 'economically dispossessed' are those most likely to become the 'culturally dispossessed'; in other words, those with the most disposable income are also those most likely to consume high culture and to influence the elite associations of high art. Embedded in Bourdieu's thinking is the idea that governments fund most of what we consider to be high art, or what a free market will not otherwise support; thus the consideration of museum visitation as 'cultural shopping' brings with it questions of the likely influence on museum audiences and the social mission, as well as museum production.

Hewison and Holden (2004) suggest that culture today is less local and national than personal, constructed by individuals who consider themselves more consumers than citizens. In a sector dominated by publicly funded organisations, the value of culture is currently at the heart of a political and philosophical debate that echoes the perennial arguments between those who advocate culture as something of innate value, and those who prefer to emphasise Utilitarian Economic values (Postman, 1996). This reflects the changing policy emphasis in the UK government from the Labour party's (1997–2010) considerations of art and culture as a vehicle for social inclusion to the current Tory perspective (2010–?) of culture and in particular the top nationally funded museums as a part of the tourism and economic infrastructure. Funding agreements between the DCMS (Department of Culture, Media and Sport, the UK's government department with responsibility for culture and tourism) and its sponsored bodies requiring not only social but also efficiency and audience targets, including the need to self generate income.

## **7 The Visitor Perspective: Contemplation, Participation or Cultural Shopping?**

Each museum is unique, but central to its purpose and function is education, and the fact that people want to view such collections. The contemplation of collections leads to an improved comprehension of the world we live in (Goodman, 1985 cited in Weil, 1990). Museums globally exist in the context of displaying a version of history. Visitors, drawn from an increasingly multi-cultural society, often question the authorised versions of events and the perspective of the exhibits on display (Cameron, 2005). Therefore museums have an additional function of considering a multiplicity of viewpoints and opinions in order to fulfil their purpose, and the



introduction of an income generation orientation into the visitor product may provide ethical challenges. Thyne (2001) refers to the development of 'edutainment' as museums increasingly find themselves working to entertain as well as educate audiences.

Hein (1998) has suggested that museums need to pay attention to learning theory and shape their offerings to meet varied learning needs. He contends that museums are part of the social and educational framework which is integral to modern society. Museums should offer the opportunity for visitors to engage with the collections in a way which stimulates them and allows the opportunity to explore. Weil (1990) claims that museums offer visitors the opportunity for stimulation and empowerment as learners: they provide opportunities for education. Knowledge is recognised as being the commodity which is offered by museums (Hooper-Greenhill, 1994). Museums assemble their collections and present them in a way which allows both physical and intellectual access to the public (Weil, 1997). Chhabra (2008) and Hollinshead (1998) argue that these current trends are leading to a "Disneyfication" or oversimplification of museum culture centred on a familiarity with 'brands'. The process of programming in the nationally funded museums that are the focus of this study has certainly been strongly influenced by the need to attract visitors in large numbers, though whether this amounts to Disneyfication is open to argument. Another driver towards the commodification of museum product is the increasing competition for time that the museum faces from other leisure products outside and within the home.

## **8 Museums Income Generation: Definitional Framework**

Museums income generation is driven by the need to make money in an environment where public funding is diminishing and becoming increasingly conditional. As we have discussed, museums are heterogeneous; that is to say, each organisation is individual and represents a unique set of material culture and cultural values that predetermine mission and constrain or shape the way in which the organisation can operate. This means that not every museum can aspire to the same scale, style or level of involvement in income generation. The National Gallery, for example, possesses an art collection of world eminence, uniquely connected to British identity and heritage. Its visitor base and location make it one of the best attended museums in the UK, and it is in receipt of a reliable, if diminishing, government grant that enables it to operate with a certain degree of confidence. It has a commercial wing, The National Gallery Company, which is staffed by commercial and marketing specialists who have a familiarity with the relevant operational, market and business environments. All of this underpins the idea of the National Gallery as an internationally powerful and recognised tourism brand capable of supporting a wide range of different income generating activities. It also highlights that smaller organisations with less financial and skills resources, and less branding power than the internationally significant National Gallery, generally possess

significantly less potential to generate income. Thus the ‘income generation orientation’ to which we refer in this paper may only apply in very particular, possibly rather narrow circumstances.

NAO (National Audit Office) (2004, p. 12) defines income generation in museums as: ‘the gross income received through fundraising and admissions, and the profit from trading activities’. Trading embraces such activities as ecommerce, licensing, catering, retail, reproduction and photograph rights, mail order and venue hire while fundraising includes gifts and grants, memberships, donations and sponsorships.

Retail, ecommerce or its cousin mail order, involves the development of merchandise, or selling souvenirs based on the idea of a visit, or on an image or object in the museum collection. This presents particular challenges of both ethics and authenticity. In developing and selling merchandise that is inspired by a collection object or image, a museum is presenting that part of history or art for the consumption of the public, and is making a judgement of what to present and how to present it on the basis not only of public interest and scholarly rigour, but also of saleability, profitability and efficiency (Gazin-Schwartz in Rowan and Baram, 2004). Key questions are the extent to which the development of an income generation orientation can influence the core scholarly and visitor provision of the museum. If, as Hewison (1991) suggests, museums lose their core identity and purpose, becoming ‘units of production’ instead of neutral custodians of our past, what influence does this have on the core responsibilities of the museum? Can income generating activities, for example retail and product development, become a vital and integral part of a museum’s mission to provide a good visitor experience and communicate cultural messages?

Retail shops in museums can fulfil multiple purposes, for example as a source of self-generated income (AEA, 1999), a tool for audience development, a form of representation of museum identities (AEA, 1999; NAO, 2004; Theobald, 2000) and a source of visitor satisfaction or experience (AEA, 1999; Kent, 2010; Kotler & Andreasen, 1987; McPherson, Foley, & Durie, 1998; Theobald, 2000). Retail finds its inspiration from core concepts associated with the organisation including but not limited to collection objects, historical themes or institutional brands (AEA, 1999; Theobald, 2000) and often sits on the cusp of what is regarded as acceptable interpretation of sensitive cultural values, occupying a place where commerce meets culture. The production and sale of merchandise involves issues of both management and representation. Constrained in their approach by limited resources and expertise, many museum organisations (often small scale, local institutions) find it difficult to realise the optimal benefits of merchandising, while the larger scale museums, for example the National Gallery, have become increasingly expert at exploiting their identities to both commercial—and cultural—gain. Yet the skills involved in authentic heritage representation, and those involved in selling culture to make money, are very different. In museums where money making takes place on a significant scale, then the activity is often managed under the wing of a separate company (eg V & A Enterprises) or charity set up with the sole purpose of managing the income generation activities. Enterprises staff are often skilled

marketers; while curatorial staff are experts in the content of their collections, hopefully skilled at interpretation and communication.

While income generation is often managed as an entity separate from the museum, the product and experience is viewed by the visitor or consumer as a seamless part of the visit, and occasionally finds value in its own right (McPherson et al., 1998). Museums need to develop new streams of income for their financial sustainability, and visitors enjoy using facilities such as shops, cafes and guided tours, yet the process of engaging in commercial activities is seen by many within the sector to threaten the integrity of the role and place in society of museums. This is relevant for wider theoretical debates on the commodification of culture as museums struggle to reconcile entertainment and educational roles in a society where they are increasingly driven to account for themselves on economic and tourism grounds. While inter-departmental collaboration between curators and enterprises has been found to be vital for income generation success (AEA, 1999; NAO, 2004), and performance indicators have been developed to measure both financial and educational success of museum retail (Mottner & Ford, 2005), internal conflicts around the role and purpose of the museum abound. In some museums, there is strong internal resistance to commercial activities (AEA, 1999).

## 9 Literature Review Conclusions

Table 1 below presents the key evolutionary stages involved in museum development to date, and considers the influence of income generation as an orientation.

The perception of the trends represented in the chart may be considered to present a dichotomy—between the externally observable outcome of a visit and the internally intangible intention. While the visitor may truly only want recreation, what the museum provides may well embrace a deeper learning intention—and while learning may well be a passive outcome of a leisure-oriented visit, it can perhaps be considered to be an intended one for the museum curator, or even the product developer. While income generation is a clear necessity in these cash-strapped days, to what extent do museums themselves consider income generation to be influencing their visitor provision? If museums still cater largely for their ‘traditional middle class’ audiences (Martin, 2002), despite efforts towards a more socially inclusive presentation during the years of the Labour Government, what impact is the new income generation orientation having on museum organisation, product and museum audiences?

**Table 1** From ‘cabinets of curiosity’ to cultural shops: the evolution of an income generation orientation in museums

Progression over time (?)				
Museums	Cabinets of curiosity—peepshows	Places of research and scholarly activity; custodians of collective heritage	Educators/story-tellers/entertainers	Cultural Shops
Role of collections	Esteem, objects of personal obsession. Consumables	Developing awareness of material culture. Sacred nature of collection objects; the need to preserve	‘Means rather than end’ ‘Units of cultural production’	Collection objects as ‘content’
Role of marketing		Supporting role; ‘clear separation of church and state’	Audience development	Marketing as the master, rather than the means?
Income generation	Private individuals as funders	Reliance on philanthropy and community funding	Public sources of funding; multiple sources of income	Increasing reliance on income generation
Orientation	Personal obsession	Self orientation—museums and curators as repositories of knowledge	Increasing market orientation—multiple audiences, multiple stakeholders including funders, sponsors, corporate and private partners	Increasing importance of income generation
Power	Private collectors	Curators (experts necessary to decode)	Central government—increasing instrumentalism of cultural policy	Increasing stakeholder involvement/ the consumer ‘cultural shopper’
Societal forces	The individual	Power of communities, the common good	Western materialism, the power of the individual	Ultimately, capitalism and the power of money.

Ever increasing stakeholder involvement in collection management (communities, government, corporate partners, patrons); arguably resulting in democratisation of curatorial processes; integration of commercial and custodial roles? Can market forces ensure equality of access to cultural heritage?

## 10 Methods

This research will aim to explore the developing orientation of a leading UK nationally funded museum—the National Gallery—from the point of view of the visitor ‘product’ and interpretation and the influence of income generation. A brief content analysis will depict general visitor provision at the museum from the perspectives of the key orientation hubs of: (1) income generation (as informed by McPherson), and sociable, recreational and participatory focus (Kotler, 2004).

A second stage of planned research will attempt to map the processes of cultural production within the museum. Following the principle of three organisational 'cultures' (enterprises, curatorial and visitor management) (AEA, 1999), each mirroring the various directions within which museum orientation is suggested to be developing, interview data is to be collected from curators, enterprise managers and visitor service staff. An analysis of the data will discuss the various perspectives on museum orientation, matching operational intention to product outcome, and considering the impact any new orientation is having on visitor provision and experience.

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# How Film Tourists Experience Destinations

Yuri Kork

**Abstract** Within the tourism industry, the specific type of tourism-Film Tourism-has recently been recognized and approached in several research projects and case-studies. The researchers agree that, in certain conditions, a film may influence the decision of the viewer to travel to the destination that such film portrays. However, there is an evident lack of understanding about the underlying reasons why films may have such a stimulating effect on tourist decisions. It is vital to research different elements of the film and their possible effects on tourism-related decisions of the viewer. Accordingly, an extensive survey was conducted, followed by a series of in-depth semi-structured interviews. The results suggest that films may affect the viewers through the processes of association construction and evaluation. The major contribution of this study is the reconfirmation that films affect tourists via a number of elements, such as visual beauty, plot, actors, credibility and the atmosphere. Furthermore, it would appear that, for most tourists, film is an additional and not a primary factor which creates a wish to travel, and the visual portrayal of the destination may be the key element which determines whether the film will affect the decision of the viewer to travel.

**Keywords** Film tourism • Tourist experiences • Destination image

**JEL Classification** L83 sports • Gambling • Restaurants • Recreation • Tourism

## 1 Introduction

In recent years, Film Tourism has become the focus of research within the tourism industry since it was recognized that films can stimulate tourism development. Many examples demonstrate the positive effects of film exposure. Most famous examples include, perhaps, Harry Potter films attracting tourists to Gloucester Cathedral, UK (Grihault, 2003; Lee, 2012), “The Sound of Music” film stimulating tourists to visit Salzburg (Hyunjung & Kaye, 2008), “Pride and Prejudice”

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increasing the number of visitor of the Netherfield Park, UK (Parry, 2008) and “The Lord of the Rings” positively affecting the tourism industry in New Zealand (Buchmann, 2010; Jones & Smith, 2005; Singh & Best, 2004). These examples demonstrate how films can increase the number of tourists at a destination they portrayed. Such destinations receive unique marketing opportunities and can provide the type of tourism that is not available at other destinations: Film Tourism.

Visiting the film-exposed destinations is a relatively recent type of tourism experience, and as destinations are constantly capitalizing on their unique elements that are not available at other destinations (such as film-exposed locations), it has become important to understand the relationship between films and tourist experiences, and how films may affect such experiences. However, the complexity of the phenomenon of Film Tourism, which is a highly personalized experience and depends on a variety of personal characteristics of the viewer, makes it a challenging area to approach. An additional challenge in understanding this type of tourism lies in the fact that, to date, most of the research in this area are case-study based and are exclusive for a particular area or film, or descriptive in nature. For example, the focus of research has been the definition of Film Tourism (Busby & Klug, 2001), its advantages and disadvantages for the local tourism industry and community (Hyunjung & Kaye, 2008), the relationship between the film and the destination image (Urry & Larsen, 2011) and, more recently, the effects films on the emotions of tourists (Kim, 2012).

Despite the advances mentioned above, there is still a lack of deeper theoretical understanding of this type of tourism (Beeton, 2005; Busby & Klug, 2001; Couldry, 1998; Olsberg/SPI, 2007; Riley & Van Doren, 1992). This paper contributes to the existing base of knowledge by attempting to examine how film tourists and make decisions to travel to the film-exposed destinations and how they experience such destinations. Results suggest that the main driving force for tourists to travel to the film-exposed locations may be the complex process of association construction that is caused by watching the film. Understanding the processes of association construction and evaluation contributes to the general understanding of Film Tourism and may help to predict and account for the effects film exposure will cause for the destination.

## 2 Literature Review

The study of Film Tourism is relatively new in tourism research. Hudson and Ritchie (2006) suggest that Film Tourism is a growing phenomenon worldwide, driven by both the growth of the entertainment industry and the increase in international travel. Consequently, as stated by Frost (2004), in recent years, there has been increasing interest in how films may shape destination images and resultant tourist expectations, behaviour and numbers.



## ***2.1 Film Tourism Definition***

The first definition of Film tourism was proposed by Evans in 1977, but a number of subsequent studies in this area developed and expanded the original definition. Macionis (2004) reports that such studies provided a range of useful terms to refer to Film Tourism: Film Tourism; Film-induced Tourism; Movie Induced Tourism; Media Induced Tourism; Cinematographic Tourism and Media Pilgrimage. This diversity in definitions, according to Connell (2012), was criticized by Olsberg/SPI (2007) Fernandez-Young and Young (2008) and Connell and Meyer (2009). These researchers attempted to reduce potential misinterpretation of this type of tourism and proposed adopt an umbrella term “Screen Tourism” to cover all forms of this type of tourism.

Despite the variety of terms to address this type of tourism, it is possible to synthesize the definitions developed by Evans (1997), Busby and Klug (2001), Grihault (2003) and Macionis (2004). These researchers suggest that Film Tourism refers to post-modern experience of a destination or attraction that has been depicted in some form of media representation, such as, video, television or on the cinema screen. Macionis (2004) adds that this definition is an example of most straightforward and logical approach.

## ***2.2 Forms of Film Tourism***

Busby and Klug (2001) referred to the concept of Film Tourism as “movie tourism” and attempted to summarise the forms of Film Tourism present in the research literature at that time and formulate the characteristics of the identified forms of Film Tourism. Busby and Klug (2001) suggested that the forms of Film Tourism depend on specific push and pull factors of the film-exposed destination, and identified several behavioural aspects of the film-induced tourist. Specifically, it would appear that different forms of Film Tourism appeal to different types of Film Tourists, influenced by complex combinations of different factors. Therefore, it can be concluded that films create a range of different Film Tourists. This theory has been further developed by Connell (2012). By summarising previous studies, Connell (2012) concluded that Film Tourists can be classified depending on which form of Film Tourism they include in their visit to the destinations. Moreover, in the context of this paper, the form of Film Tourism where the viewer performs a “visit to portrayed location (real/substitute)” (Connell, 2012, p. 1010) is approached and examined.

Furthermore, many researchers agree that Film Tourism is a form of cultural tourism (Hudson & Ritchie, 2006; Iwashita, 2006). Films may create a wish to visit heritage sites (Frost, 2004) and can communicate cultural meanings (Busby & Klug, 2001). Macionis (2004) further developed the role of Film Tourism as a

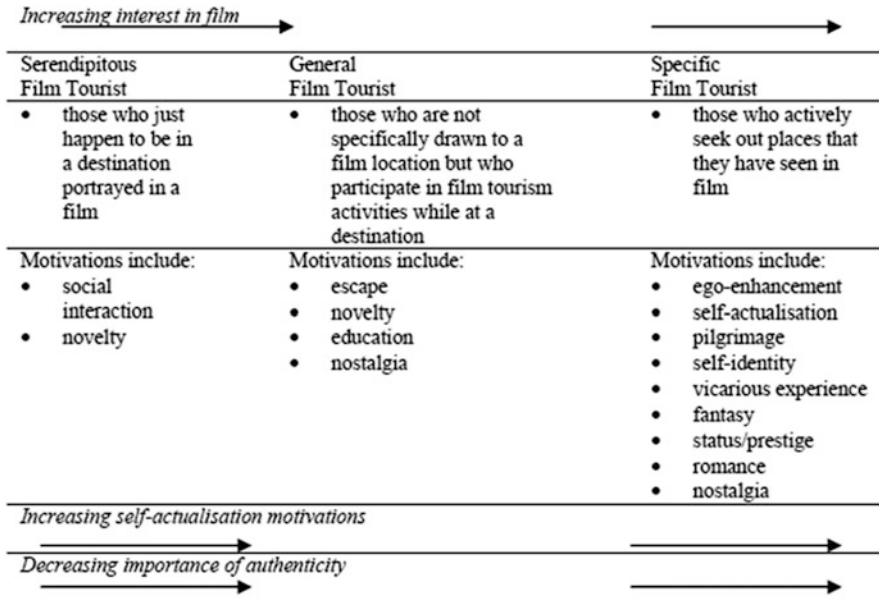


Fig. 1 Continuum of film-induced motivation. Macionis (2004, p. 94)

form of culture tourism, and adapted the cultural tourist classification model by McKercher (2002) to the specific Film Tourism context (see Fig. 1).

Macionis (2004) developed three types of Film Tourists: the Specific Film Tourist (this tourist actively seeks out places that they have been exposed to by the film); the General Film Tourist (this tourist is not specifically drawn to a film location but participates in Film Tourism activities while visiting the destination); and the Serendipitous Film Tourist (this tourist just happens to be visiting a destination portrayed in a film, and the presence of this tourist is not related to film or media portrayal; this tourist may or may not participate in Film Tourism activities). However, it must be noted that such an approach to Film Tourist classification was criticized by Fernandez-Young and Young (2008) who perceived it as simplified and not comprising the degree the film influence on Film Tourists, which may be more diverse than presented in this classification. This demonstrates that classification of Film Tourism is a complex evolving process and no universally accepted system to classify Film Tourism exists.

### 2.3 Film Tourist Profile

It may be suggested that Film Tourist can be differentiated from other tourist types by a number of specific characteristics. From the demographical perspective, Busby

and Klug (2001) suggest that cultural tourists tend to be affluent older professionals and senior managers from the ABC1 socio-economic groups, and present evidence from Prentice (1996) and Kerstetter, Confer, and Bricker (1998). This argument is supported by Kim, Agrusa, Chon, and Cho (2008), who stated that Film Tourists tend to be middle-aged, have high income and high education level. However, Busby and Klug (2001) additionally mention that

Richards (1996) suggests that the majority of Film Tourists are younger, highly educated and from higher socio-economic backgrounds.

It must be added that Connell (2012) argues that, in a majority of current studies, the research focused on a specific film, which may attract tourists of specific demographic characteristics while being less influential for other film-induced tourists. Singh and Best (2004) and Hyunjung and Kaye (2008) support this argument in their case studies that focus on “The Lord of the Rings” and “The Sound of Music” films. Moreover, the case study of Korea by Kim (2012) contributes to discussion about the profile of Film Tourists by suggesting that the nationality of the Film Tourist has an effect on Film Tourist behaviour and interactions with the destination.

While specific locations have received some attention in the research literature, for example, New Zealand in the research by Singh and Best (2004) and Carl, Kindon, and Smith (2007) or Korea in the research by Kim, Agrusa, Lee, and Chon (2007) and Kim (2012), Connell and Meyer (2009) report that there is a limited understanding about the perception of the destination by Film Tourists and their interaction with the destination. To develop such understanding, it is important to explore how film tourists make decisions about their film-induced travels.

### 3 Methodology

The purpose of this study is to investigate the processes of films affecting tourist experiences. The methodological component of this paper is divided into two phases. The first quantitative phase involves a questionnaire survey to examine how films affect tourist decisions and experiences. The survey utilized both closed and open questions to allow for deeper investigation. This phase was followed by a series of qualitative interviews with a purposive sample of the respondents who completed the questionnaire.

The quantitative survey is based on the literature review and survey utilized 21 “closed” questions, 7 Likert scale questions and 10 “open” questions that, in most cases, provided respondents with an opportunity to explain in more detail why they chose a certain option in the closed question. The questionnaire was designed to examine both how the tourists make tourism-related decisions and to evaluate the influence that film has on such decisions. The final reviewed survey utilized the non-probabilistic convenience sampling (Wheeler, Shaw, & Barr, 2004) and targeted randomly selected individuals from the general population. The socio-demographic variables of the survey were developed to be similar to that of

previous research. The analysis of the questionnaires was performed by using the SPSS (Statistical Package for the Social Sciences) system. Field (2009) reports that the SPSS is an appropriate package to explore the possible connections between the variables; in the case of this research, the relationship between the films and the tourist experiences.

The qualitative stage of the study adopted face-to-face interviews. The reason for this method lies in the highly personal nature of the film influence, and Veal (2011) suggests that face-to-face interviews may be most convenient method to access such complex data. The interviews, while semi-structured to allow a level of flexibility, majorly focused on four aspects of Film Tourist experience: motivation to travel, changes in destination image and destination interest, emotional responses and experiences of the respondents and desired and/or previously experienced Film Tourism visits. To address these dominant themes, the key questions of the questionnaires were identical, but allowed for additional individually-designed questions to address the specific respondent and specifics of his/her questionnaire replies.

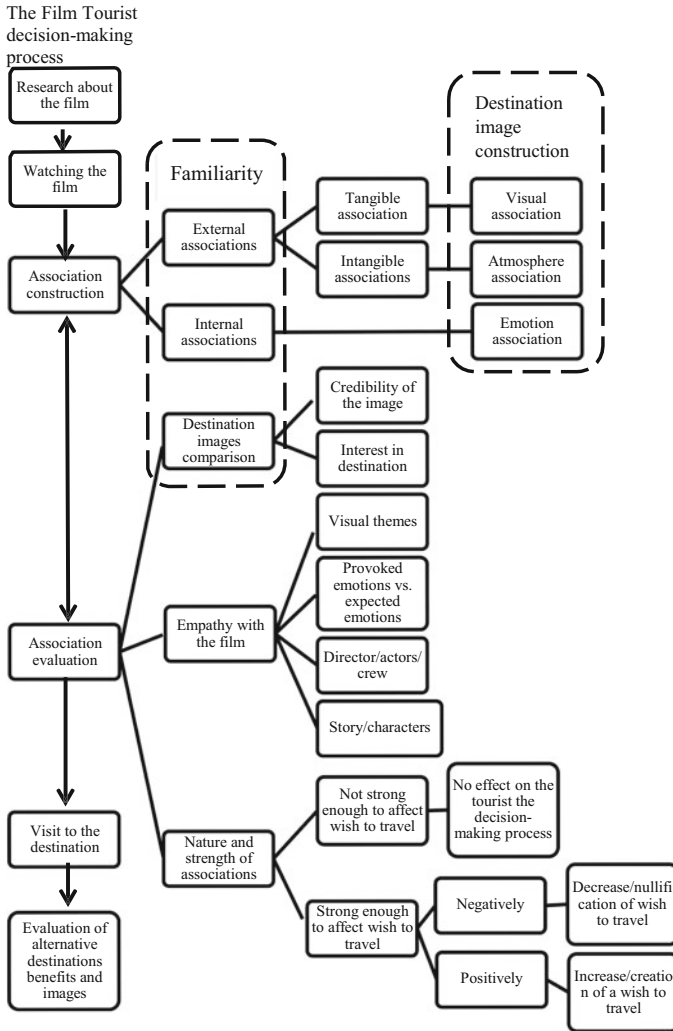
## 4 Discussion and Conclusion

The results suggest a connection between the films and the experiences of tourist. It would appear that films may affect tourists by creating the associations with the destination, which consequently are evaluated by the tourists. The results of such evaluation establish the degree of film influence in tourist experiences. The results of this study may be summarised in Fig. 2.

As can be seen in Fig. 2, results suggest that films begin to influence the experiences of potential film tourists when they confront the information about the film, possibly in the form of commercial description and/or word-of-mouth, and may be both purposively researched or incidentally acquired. This information, informing potential viewer about the theme, genre, director and/or actors of the film is then used in the decision of the potential viewer whether or not to watch the film. If the decision to watch the film is positive, the information about the film may be used by the viewer to construct the expectation from the film, particularly, an emotional experience the film may cause. When such expectations have been made and were found desirable by the potential viewer, he/she may watch the film.

This study established that, during the process of watching the film, several associations with the destination are constructed. Specifically, “Visual Association”, which connects specific visual images with the destination portrayed; “Atmosphere Association”, which connects specific “feeling” and atmosphere with the destination portrayed; and “Emotion Association”, which connects specific emotions with the destination portrayed, and is connected with the motivators to travel.

The main factor that affects the “Visual Association” is the visual quality of the destination in the film, such as landscape, memorable heritage sites or scenic beauty, indeed, as stated by Lefebvre (2006, p. 28), cinema “offers a visual



**Fig. 2** Film Tourist decision-making process. Developed from Faye and Crompton (1991), Macionis (2004) and Hudson, Wang, and Gil (2011)

spectacle”. The “Atmosphere Association” is different because it belongs to the “Intangible Associations” group (see Fig. 2) and operates with the intangible phenomena of feeling, culture and sensual characteristics of the destination. These two associations are inter-connected because cultural and social elements are constantly interconnected with visual images (Debord, 1983). Specifically, Bordwell and Thompson (1993) argue that the filming process can be used to fill

the filmed destination with symbolism and meaning and, that through this process, develop the landscape into the “cultural property” (Weir, 2002).

The “Emotion Association” may be the most developed association, as films are designed to provoke emotions, as Connell (2012) suggests the central facet in film is the experience of emotion. Simultaneously, films associate locations with emotions and, in some cases, with actual motivators to travel, because emotional attachment can fuel the motivational needs of the tourists (Gnoth, Zins, Lengmueller, & Boshoff, 2000), which may result in an actual visit. Tooke and Baker (1996) add that film is more likely to affect the tourist experiences if it creates strong associations between emotions and places. It can be suggested, furthermore, that different association types are formed simultaneously in the interconnected processes, a phenomenon Brégent-Heald (2007, p. 67) refers to as the “interconnected web”.

“Visual Association” is the main element of the process of association formation, necessary for other associations to be formed. In certain conditions such as, for example, extraordinarily visual qualities of the destination, the influence of “Visual Association” may be strong enough to affect a wish to travel. However, “Visual Association” may be formed simultaneously with “Atmosphere Association”, which conveys the mood and atmospheric aspects of destination. The “Emotion Association” may also be formed simultaneously with “Visual Association”. Morgan (2006) suggests that films can transform locations into the “emotional territory” by connecting emotions to visual themes of a location.

Moreover, after being constructed by the film, the associations are evaluated by the viewer. During the evaluation process, several conditions need to be met by the film and associations in created in order for it to impact tourist experience. Specifically, a film needs to be liked by the viewer, it needs to be trusted by the viewer and needs to affect the viewer strongly enough to influence him/her to travel.

The qualities of a likeable film are very difficult to define and evaluate, because such qualities are highly personal and depend greatly on the profiles of the viewers: different people like different films. Additionally, from the perspective of the film production industry, it would appear that there is no definite understanding about the features that make the viewers like the film. This study suggests that the empathy with the film originates from four aspects: emotional evaluation, visual qualities, director/crew and story/characters.

Visual qualities of the film depend on filmed locations: if the viewers perceive them a beautiful, they may empathise with it more; this element of the film influence depends on the viewer’s sense of beauty. Emotional evaluation is established when the viewer compare the emotions they were expecting from the film (based on prior-watching information) and the emotions caused by the film. If the film failed to provide desired emotional experience, the empathy with it lowers. Similarly, if the viewer enjoys directors/actors of the film and story/characters portrayed, he/she may like the film more, in certain cases despite the possible lack of beautiful scenes or satisfaction of desired emotional needs.

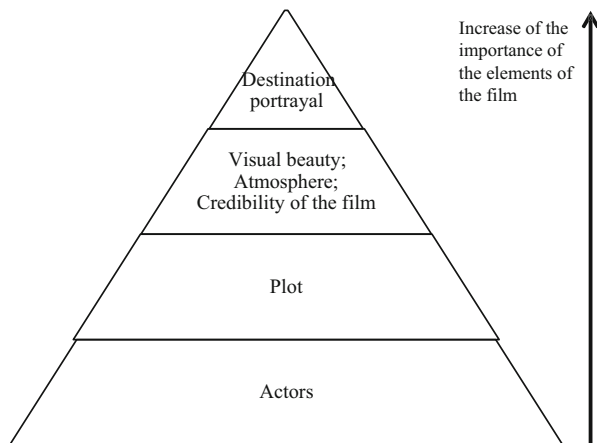
Focusing on the credibility of the film, Butler (2011) reports that the image of the destination created by film is fictional in nature, and the appeal of an actual destination conveyed through the film may be greater than the actual location.

Because of this, film-created destination image may contradict with the image of the destination the viewer had before watching the film. In such a situation, particularly if the viewer had prior interest in the destination and accumulated reliable information for comparison, the viewer may evaluate the film as not credible information source about the destination, because the film does not provide the correct information about the destination. However, if the viewers detect no misrepresentation in the film, they may conclude that the film is a credible source of information about the destination, and the new film-created destination image may increase an interest in the destination.

Finally, focusing on the strength of associations, even if the film is trusted and liked by the viewer, the associations it created may not be strong enough to affect tourist decisions and influence them to seek Film Tourism experiences. In addition, strong associations may be both positive and negative in nature. Specifically, the results suggest that the association-created destination image can be strong or weak. A weak image does not appear to affect the wish to visit the destination the film portrays, and films that create weak destination images are less likely to affect tourist experiences. However, if the associations are strong, either positively or negatively, the implications for the tourist experience can be, subsequently, contributing or damaging. The strong negative associations may not affect the travel decisions of the viewer, or may have a damaging effect on the wish to travel to the destination and decrease it, for example, if the film evoked strong undesired negative emotions which became associated with the destination. If the association is strong and positive, it can create a desire to travel to the destination (if such a wish did not exist before watching the film), or it can contribute to the existing wish to travel to the destination.

It is important to note that not all of the themes mentioned are equally important and strong when affecting tourist experiences. It is important to recognise the difference in significance of these elements, presented in Fig. 3.

**Fig. 3** The importance of the film elements. *Source:* author



It would appear that the core element of the film that affects whether the film will influence the viewers to travel is the portrayal of the destination. This element must be noted, despite being straightforward and expected, because a number of films are made with the usage of digital technologies or in specifically built sets and cannot be connected to any destination.

The less important elements are the visual beauty of the film, and the atmosphere portrayed in it. Indeed, the images of the film (from the viewer's perspective) need to be inspiring and beautiful and, similarly, the atmosphere must be engaging and desirable for the viewer. Moreover, the film needs to be credible so that the beauty of the images and the qualities of the atmosphere were trusted by the viewer. If these requirements are not met by the film, the probability of film affecting the viewer greatly decreases.

Less important elements of the film are the plot of the film, and the interest in the destination. However, even if the plot is not evaluated as enjoyable by the viewer, the beautiful visual themes in the film and the inspiring atmosphere may overpower the flaw in the plotlines of the film. Finally, the least important elements are the actors and the genres. Viewers confirm that acting is not as important as previous aspects, and actors rarely affect the decision to travel to the filmed locations despite their ability to affect the satisfaction from the film. However, fans of a specific actor, who may wish to travel to the location where his/her favourite actor has been filmed, may be the notable exception, but such form of specialised Film Tourism was not explored in this study.

In conclusion, this study reconfirms the complexity of Film Tourism, as it would appear that its high dependent on emotions and personal profiles of the viewers make it a challenging area of research to approach. The role and value of the emotional components in film-induced tourist experiences need additional research. This paper has identified the potential of films to affect tourist experiences. It was established that films affect tourists by constructing subsequently evaluated associations with the destinations. The associations include visual themes, atmospheric features and emotional engagement of the film. While not equally important, film elements in combination may affect the viewer's wish to travel to the film-portrayed location and partake in Film Tourism experiences.

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# Citizen Perspectives on the Development of Local Cultural Resources: The Case of the Municipality of Serres

Ioannis Samoladas, Charalampos Zilianakis, Katerina Lazaridou, Konstantina Papadopoulou, Eleni Tsolaki, and Dafni-Maria Nerantzaki

**Abstract** Nowadays, cultural development is considered to be a matter of high priority for a modern state. Local cultural assets play a major role in the design and development of a successful and sustainable national cultural development policy. The purpose of the current survey is to explore to what extent people who are residents at the Municipality of Serres realize the importance of cultural assets in the context both of national or regional economic development and which are these local cultural assets and resources. Additionally, the survey presented, attempts to gain insight into what are the factors that inhibit local cultural development and which are the main driving instructions responsible for the exploitation of these cultural assets and resources. In order to achieve its goals, the survey utilizes a sample of 121 responses to a comprehensive questionnaire, answered mainly by people who are permanent residents at the greater area of the Municipality of Serres. Analysis of the results gave strong evidence that the Municipality of Serres hosts and important number of cultural resources, which are not yet sufficiently exploited and promoted. In addition, citizens realize the important role cultural development can play in local economy and the value it can add in order to advance local economy as a whole.

**Keywords** Cultural tourism • Local development

**JEL Classification** Z1 cultural economics

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## 1 Introduction

Modern states have realized and appreciate the importance of cultural assets and resources in their socio-economic development. Although the movement of cultural resource management can trace its origin to the middle of the past century and it was initially focused on the environmental aspects of cultural resources, nowadays it has become an important aspect of the development agenda, covering sectors such as archeology architecture, folklore actions and movements. The expression of the national policy on cultural development is mainly responsibility of local government bodies, such as regional governments and municipalities. The latter have identified the crucial role cultural resources exploitation can play and have initiated a rigorous approach to cultural assets and resources exploitation. However, there are cases where local authorities take actions without taking into accounts perspectives or views of their citizens. Thus, sometimes, their actions are moving to a direction rather different than that local citizens think or imagine.

The connection between cultural assets and resources management and tourism also stress the importance of taking into account local residents perspective and view in cultural development planning. In the present days of economic recession it is necessary for all the concerning bodies, citizens, organizations, institutions, enterprises and the local authorities to cooperate in cultural development planning in order to achieve a successful and profitable result.

The study presented is a first attempt to explore views and perspective that citizen have about regional cultural policy both nationwide or locally. It also tries to identify which are the main cultural assets of the Municipality of Serres and the factors that inhibit local cultural development.

## 2 Literature Review

### 2.1 *Definition of Cultural Heritage*

According to the 1972 World Heritage Convention, which took place in Paris on 16th November, cultural heritage consists of the following:

- *Monuments*: architectural works, significant works of sculptures and painting, works or structures of archaeological nature, inscriptions, caves and combinations of features, of outstanding universal historical, artistic or scientific value.
- *Groups of buildings*: individual or groups of buildings, which their architecture, homogeneity or location, are of exceptional universal value from a historical, artistic, or scientific perspective.
- *Landscapes*: works of man or combined works of man and nature including archaeological sites of universal value from a historical, aesthetic, ethnological and anthropological perspective. (Lavvas, 2001)

## **2.2 Cultural Resources**

Cultural resources are related to the remains and sites associated with human activities and natural surroundings including natural resources, natural environment, human capital and cultural services. Cultural heritage, folklore culture and tradition, digital culture, modern and contemporary production/creation, mass culture/creative industries, and multiculturalism-interculturalism belong to cultural categories (Tsiliras, 2010).

### **2.2.1 The Concept of Culture**

In the modern era, cultural development and cultural resources management is one of the main priorities of a modern state. Therefore, any government should include, serve and recognize cultural rights for all as an indivisible part of individual and social rights.

Cultural heritage of each country is a common good, while its diffusion and indulgence is a fundamental right of citizens.

As mentioned above, cultural heritage is a multi-dimensional process, which more and more expands its content and meaning. This term does not refer only to contemporary artistic creation, but also to broader culture of everyday life: natural and structured environment, aesthetic and functionality of cities, landscaping (architecture and land planning), spiritual values of everyday experiences, multiculturalism of modern societies and especially digital culture (Gkefou-Madianou, 1999).

### **2.2.2 Culture as a Productive Force**

The state should promote financing of private monuments which is currently left to the owners and they are often destroyed. The state also has to contribute to:

- Create conditions in favor of the development of the appropriate infrastructure capable for the production cultural products and services, with high quality standards and certified procedures.
- Promote and project, certified products and services in cooperation with private enterprises, and particularly small and medium sized enterprises and women cooperatives at a specified framework of principles and incentives with transparent procedures (copies from museums, food products, etc.).
- Promote research publishing related to the study and research of cultural heritage.
- Promote “smart” products and services in the tourist market.
  - With the formation of a special service for the presentation, utilization and promotion of the cultural capital (Tsiliras, 2010).

### 2.2.3 The Contribution of Culture to Local Development

Local society play an important role in times such as the current economic recession and can provide substantial help to mobilize development forces and thus overcome economic obstacles. This help, by the local community, is not limited to the supply of the necessary financial aid, but expands to providing the means and facilities, any volunteering work needed and above all the consensus needed in many cases in order to overcome obstacles posed by minorities. Municipalities are the first level of regional governance. Thus they have the main responsibility and should be the main driving force behind any actions to promote local cultural assets and resources. They are responsible for any attempts to draw new policies and strategies for local cultural resources exploitation. Municipalities are the link between central government (the state) and citizens. They are also responsible to protect local cultural assets and resources in a sustainable manner, trying to maintain a cooperation spirit between all the institutions, organizations and enterprises involved in the exploitation of local cultural resources. Finally it the Municipality which has to take into account citizens real needs and to inform them responsibly about future actions that need to be taken. Therefore a survey like the one presented, is rather useful for regional government bodies.

### 2.2.4 Cultural Tourism

Cultural tourism is one of the fastest developing sectors in the industry of tourism. Since 1970, the demand for cultural tourism in Europe has increased considerably, because of the “new middle class” with high levels of education and income (Wang, Fu, Cecil, & Hji-Avgoustis, 2008).

Culture is a factor of great importance for the design of the national policy of tourism. Cultural tourism is composed of mutually dependent activities and plays an important role in the development of the industry of tourism, even in the restoration and recovery of certain areas, zones and cities. Cultural tourism is not only the basis for the tourist boom in cities but also a promotion instrument of tourism, in rural and regional areas. It is the kind of tourism which is rapidly developed these days (Bachleitner & Zins, 1999).

Numerous studies have shown that culture and tourism can provide resources for socio-economic development in regional communities. The cultural development of the countryside can utilize natural and human resources of an area, community and family relations, heritage and lifestyle (MacDonald & Joliffe, 2003).

Cultural tourism has been defined as the movement of individuals to cultural attractions, away from their normal place of residence, with the intention to gather new information and experiences in order to satisfy their cultural needs. It is a kind of tourism of special interest, based on the search for and participation in aesthetic, spiritual, emotional and psychological experiences. It is approached holistically, but also with emphasis on heritage (monuments, archaeological sites, museums,

etc.), for example, performing arts are less likely to be reported as part of the cultural product of tourism. Cultural tourism includes tourism in urban cities (mainly historical and large cities) and their historical facilities (such as museums, theaters), as its subject is, the discovery of monuments and sites. It can also include tourism in rural and regional areas projecting the traditions of indigenous communities (e.g. festivals, observation of traditional dances or ceremonies, markets of handmade crafts, rituals), their values and lifestyle (Shamsuddoha, Alamgir, & Nasir, 2011). Finally cultural tourism can also include native language, gastronomy, and technology of the past, clothing and leisure activities (Asplet & Cooper, 2000).

### 2.2.5 Purpose of the Survey

Due to the fast and wide modern cultural development, it is considered a good practice for a local government, with a rich local cultural heritage, not to take advantage of it. In addition there are cases where local residents, or even organizations involved in local cultural actions, are unaware of their local cultural resources and their value. The purpose of the survey presented is to explore whether there are such conditions in the area of the Municipality of Serres. The questionnaire attempts to reveal any misconceptions citizens have, to find the degree they are aware of what local cultural resources exist in their area, their value and how local cultural development can help to advance local economy. Moreover, the aim of the current survey, is to acknowledge the local authorities how their citizens think about what local cultural development is, the problems they face and their priorities. Thus, they will be able to prioritize possible future actions in order to attract tourists interested in Municipality of Serres local cultural resources.

## 3 Methodology

This survey aims to explore the degree of exploitation of cultural resources by Municipality of Serres. In addition it tries to inform the citizens of Serres about the opportunity of local authorities to deal with economic crisis by exploiting cultural resources. Through this process Municipality of Serres will have the opportunity to develop the socio-cultural sector of the city, which in turn can lead to the increase in the number of tourists and ultimately the economic growth of the area. The answers of the participants to the survey indicate that the citizens are aware of the benefits, which emerge and they are positive to all the necessary changes, which can be achieved through the cooperation of all the responsible organizations.

The format of the research conducted is descriptive and the collection of primary data was made with a quantitative research that includes a poll with the use of structured prototype questionnaire.

The survey took place during the period 3–24 December 2014 with questionnaires shared and filled out via e-mails sent online. Questionnaires included a short covering intro for the information of the recipients about the purpose of research, assurance for the anonymity of respondents and instructions for completing the questionnaire. The survey was designed and hosted at Google Forms®. It contains 25 questions and it is divided into three parts. The first part (Part A) includes general questions about the topic, second part (Part B) some more specific questions on the subject, and finally (Part C) some basic demographic data.

The data collected from the questionnaires have been indexed in Microsoft Office Excel 2013 and subsequently the analysis of data was carried out with the use of the SPSS® Statistical Package.

The number of questionnaires sent was 160, the completed questionnaires were 121, and thus the number of the research response reached a rate of about 75 %. Due to the fact that the sample used is a convenience one, the questionnaire was sent to a random sample of our social environment. The survey included an initial pilot study, which was followed to minimize the errors. Some questionnaires were given to 4 friends in order to figure out the likelihood of possible difficulties, which might occurred during the completion process.

The collection of the survey data did not show great difficulty. The response was in a sufficient level, as the proportion approximates almost more 7 out of 10 respondents (75 %). The only constraint noted was that respondents hailing from the city, but which now residing elsewhere were not able to answer all questions, since they have not full impression on the current situation. Consequently, the sample were limited mainly to people not only hailing from Serres but also live in the city permanently.

## 4 Results of Our Analysis

As mentioned earlier, the sample of our research consisted of 121 fully completed questionnaires. The responders were 48 men (40 %) and 72 women (60 %). Two of them were below 18 years old (1.7 %), 54 were between 19 and 30 years old (45 %), 50 were between 31 and 45 years old (41.7 %) and 14 were above 46 years old (11.7 %). Information regarding their profession and their education are presented in Table 1. Regarding their origin, 111 of the responders come from the greater area of the Prefecture of Serres, while 10 come from the rest of Greece.

For the purposes of our analysis we used the SPSS® Statistical Package. In order to measure the reliability of our questionnaire, we calculated Cronbach's  $\alpha$ , which for the whole questionnaire was  $\alpha = 0.770$  a score that is considered sufficient (Nunnally & Bernstein, 1994).

For the first part of our questionnaire, which refers to the general view about local cultural development, the majority of the responders, up to 75 %, believe that Greece's local natural and cultural resources are not exploited significantly. Around the same percentage of the responders believe that the Greek regional cultural policy is not sufficient. The majority also believes that local cultural resource can



**Table 1** Distribution of responders according to their profession

Profession	Frequency	Percent	Education	Frequency	Percent
Freelance	33	26.7	Primary education	2	1.7
Private sector employee	18	15.0	Secondary education	22	18.3
Public sector employee	14	11.7	Vocational training	10	8.3
Unemployed	28	23.3	Bachelor degree	51	41.7
University student	18	15.0	Master degree	34	28.3
Retired	10	8.3	PhD degree	2	1.7

**Table 2** Summary of the responses of the general questions of our questionnaire

	Completely disagree (%)	Disagree (%)	Neither disagree nor agree (%)	Agree (%)	Completely agree (%)
1. Our local natural and cultural resources are exploited at a significant level	15.0	60.0	21.7	3.3	00.0
2. Greek regional cultural policy is sufficient	16.7	60.0	21.7	00.0	1.7
3. Exploitation of local cultural resources can advance its development	3.3	00.0	6.7	41.7	48.3
4. Alternative ways of tourism might be the answer to the present economic crisis	1.7	3.3	18.3	53.3	23.3

advance local economic development (90 %) and alternative ways of tourism can be the answer to the present economic crisis (77 %). Detailed results regarding the general views are shown in Table 2.

Regarding differences in answers of the general questions between gender, our analysis showed differences (significance level 0.05) only in the last two questions, with women being more positive (grouped median = 4.53) than men (grouped median = 4.00) that local resources can advance the local economy (Mann–Whitney’s  $U = 2224$ ,  $z = 2.944$  and  $p = 0.003$ ) and alternative tourism is an excellent opportunity in local economic development (women grouped median = 4.25, men grouped median = 3.46,  $U = 2640$ ,  $z = 5.364$  and  $p < 0.001$ ). Running Kruskal–Wallis tests to examine differences (significance level 0.05) between age groups, profession, education and origin did not show any significant results (all  $p$  values were bigger than 0.35).

Next question (question number 6) is about “Who is main responsible for the exploitation of the cultural resources of our country”. The majority (82 %) of the responders believes that the main responsibility for the exploitation of the cultural resources of our country is equally distributed between the local government, cultural organizations and nonprofit organizations. There is a smaller percentage

of responders (26 %) who believe that the only responsible for the exploitation of the cultural resources are local governments, while a 12 % argues that this responsibility should be given to cultural organizations. Running a chi square analysis between gender, age groups, profession, education and origin did not give any significant results.

The responses regarding views about the Municipality of Serres are shown in Table 3. The majority of the responders agrees that the Internet is a great opportunity to promote local cultural resources (79 %), the local private sector could contribute to the development of the local resources (77 %), the Municipality of Serres is challenged by the economic crisis (69 %) and that the exploitation of local

**Table 3** Summary of the responses regarding views about Municipality of Serres

	Completely disagree (%)	Disagree (%)	Neither disagree nor agree (%)	Agree	Completely agree
6. Municipality of Serres is challenged by the economic crisis	1.7	6.7	23.3	38.3	30.0
7. By exploiting the benefits of cultural resources the Municipality of Serres could overcome the economic crisis	1.7	15.0	20.0	55.0	8.3
8. Cultural associations and other cultural institutions are sufficient to promote the cultural resources of the Municipality of Serres	6.7	53.3	23.3	15.0	1.7
9. The Municipality of Serres has the appropriate infrastructure for further tourism development	10.0	56.7	16.7	13.3	3.3
10. Local private sector in Serres could contribute to the development of cultural resources	1.7	3.3	18.3	61.7	15.0
11. Activities of existing cultural organizations are excellent	5.0	58.3	30.0	6.7	00.0
12. Advertising of the cultural resources of the Municipality of Serres is excellent	15.0	58.3	21.7	5.0	00.0
13. Promotion of the local culture through the Internet could be significantly beneficial	6.7	1.7	13.3	48.3	30.0

cultural resources could help the Municipality to overcome the economic crisis (64 %). On the other side, the majority disagrees with the view that the Municipality of Serres has the appropriate infrastructure for further tourism development (67 %), the local cultural associations and institutions are sufficient enough to promote the cultural resources of Serres (60 %), the activities of those afore mentioned associations and institutions are excellent (63 %) and that the advertising of the local cultural resources of Serres is sufficient (73 %).

Regarding differences of the responses between genders (significance level 0.05), women (grouped median = 4.14) agree more than men (grouped median = 3.5) that the Municipality of Serres is challenged by the economic crisis (Mann–Whitney's  $U = 2227$ ,  $z = 3.077$  and  $p = 0.002$ ). Women (grouped median = 3.72) also agree more than men (grouped median = 3.25) that exploitation of the cultural resources could help overcome the crisis ( $U = 2140$ ,  $z = 2.435$  and  $p = 0.015$ ). Women agree (grouped median = 4.31) more than men (grouped median = 3.37) that the Internet could be beneficial to the promotion of local cultural resources ( $U = 2442$ ,  $z = 4.13$  and  $p < 0.001$ ). Women are less negative (grouped median = 2.67) than men (grouped median = 2.08) to the view than the Municipality of Serres has the appropriate infrastructure for tourism development ( $U = 2296$ ,  $z = 3.381$  and  $p < 0.001$ ).

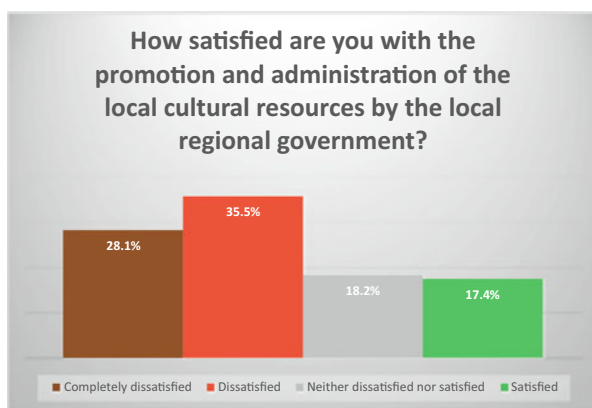
Analysis of the responses according to the age groups showed one difference between those who are up to 30 years old and those who are above 30 years old. Particularly, the first group has a more neutral view (grouped median = 3.25) than that of the second age group (grouped median = 3.78) regarding the benefits of the exploitation of local cultural resources ( $p = 0.06$ ). Views about questions 6, 9, 10 and 13 differ significantly between different professions ( $p = 0.005$ ,  $p = 0.001$ ,  $p = 0.004$  and  $p = 0.011$  respectively). Education affects only questions 6, 8 and 13 ( $p = 0.005$ ,  $p < 0.001$  and  $p = 0.009$  respectively). Profession and origin do not affect any of the views of the responders.

The responses regarding question 14 “Which of the following local cultural organizations do you believe they contribute to the development of the local cultural resources?” results are shown on Image 1. Responders believe that the Culture Department of the Municipality of Serres and the DIPETHE (Municipality Administered Theatre Organization) are two main contributors to the development of the local cultural resources with 73.6 % and 70.2 % respectively. Running a chi-square analysis showed that women tend to believe more in KEDIS (Municipality of Serres Non Profit Welfare Organization), DIPETHE and the Lyceum Club of Greek Women than men ( $\chi^2(1) = 9.143$  and  $p = 0.002$ ,  $\chi^2(1) = 9.550$  and  $p = 0.002$  and  $\chi^2(1) = 7.208$  and  $p = 0.007$  respectively). Age also has a positive effect on KEDIS, DIPETHE and the Lyceum Club of Greek Women, with more

**Image 1** Results for the question “Which of the following local cultural organizations do you believe they contribute to the development of the local cultural resources?”

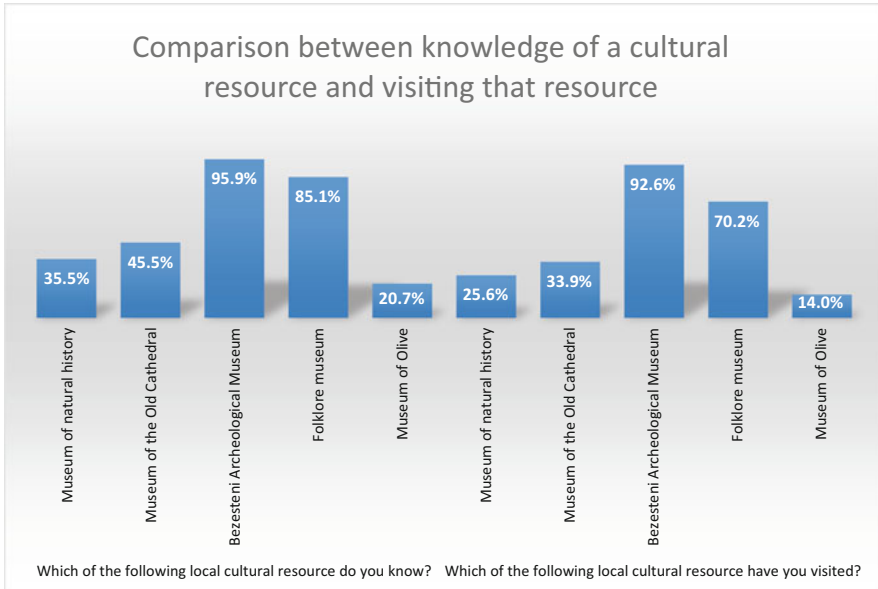


**Image 2** Results for the question “How satisfied are you with the promotion and administration of the local cultural resources by the local regional government?”



preferences in the ages groups above 31 years old ( $\chi^2(1) = 10.575$  and  $p = 0.014$ ,  $\chi^2(1) = 14.490$  and  $p = 0.002$  and  $\chi^2(1) = 17.340$  and  $p = 0.001$  respectively). Profession, education and origin do not significantly affect the results.

The responses regarding question 14 “How satisfied are you with the promotion and administration of the local cultural resources by the local regional government?” results are shown on Image 2, with the majority of the responders to be either completely dissatisfied or dissatisfied (28.1 % and 35.5 % respectively). Gender, age, profession, education and origin do not significantly affect the results.

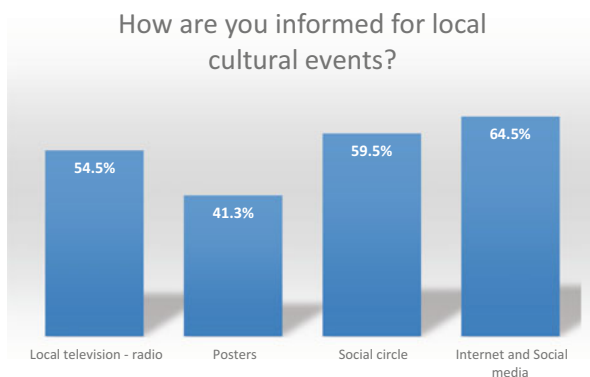


Next questions are about local cultural resources. The most popular cultural resources are the Bezesteni Archeological Museum and the Folklore Museum with 95.9 % and 85.1 % of the responders to be acknowledged of them respectively. Regarding those resources that responders have actually visited, the Bezesteni Archeological Museum and the Folklore Museum with 92.6 % and 70.2 % respectively are the most visited. The correlation of the knowledge of a resource and actually visiting it is rather high (for all pairs, correlation is significant at the 0.01 level with Pearson  $R^2$  being 0.625, 0.640, 0.512, 0.540 and 0.504 for the five cultural resources respectively). Gender, age, profession, education and origin do not significantly affect the results of the two questions.

Regarding the frequency of the visits the answers are Never 3.3 %, Hardly (once a year) 65 %, Rarely (two or three times a year) 23.3 %, Often (four or five times a year) 6.7 % and Very often (more than six times a year) 1.7 %. Regarding analysis between factors than might affect the frequency, only gender has a significant effect on visit frequency with women to visiting cultural resources more frequent than men ( $\chi^2(1) = 20.351$  and  $p < 0.001$ ).

Next question is about “How are you informed for local cultural events?”. The results of the question are shown in Image 3. Analysis of the results reveal that women prefer more to be informed by their social circle ( $\chi^2(1) = 6.690$  and  $p = 0.01$ ), younger responders do not prefer local-television ( $\chi^2(1) = 16.350$  and  $p < 0.001$ ) but they prefer the Internet and Social media ( $\chi^2(1) = 9.750$  and  $p = 0.021$ ). Internet and social media is preferred by bachelor holders and graduates of secondary education ( $\chi^2(1) = 23.404$  and  $p < 0.001$ ). There is no other significant result that affect the answers of this question about factors.

**Image 3** Results for the question “How are you informed for local cultural events?”



**Table 4** Summary of the responses regarding the assessment of the inhibitory factors of the local cultural development

	Unimportant (%)	Of little importance (%)	Moderately important (%)	Important (%)	Very important (%)
1. Only road transportation and bad quality railroad	10.0	18.3	16.7	16.7	38.3
2. Low quality promotional activities	5.1	16.9	16.9	22.0	39.0
3. Promotional activities focused on Greeks (and not foreigners)	11.7	10.0	26.7	25.0	26.7
4. Bad internet usage	6.7	6.7	31.7	33.3	21.7
5. Abundance of local culinary identity	18.3	28.3	25.0	16.7	11.7
6. Few quality hotels	8.3	11.7	31.7	31.7	1.7

The last questions are about the assessment of the factors that inhibit the development of the local cultural development. The results are shown in Table 4.

Results show that apart from the abundance of a local culinary identity, all the other factors seem to be equally important for the responders. The gender does not affect the results. People between 19 and 30 years old and people above 46 years old believe that factors 1–4 and 6 are more important than factor 5 ( $p < 0.003$  for all factors). Education, profession and origin do not significantly affect the results.

## 5 Conclusion

The purpose of the survey was to examine how citizens perceive the contribution of cultural resources in development of the Municipality of Serres and to gather evidence about the weaknesses in the management and administration of local cultural resources by the governing bodies or local cultural organizations. In addition, the survey tried to capture and measure disadvantages in the current status local cultural administration and give some evidence about which local cultural resources could be further exploited in order to advance the local economy.

According to the survey most of the responders believe that the cultural resources are not exploited in a sufficiently at a national level, while the majority of them are aware about their contribution in the further development of a place challenged by the current economic recession. Most of the responders also, share the belief that only through cooperation of all the organizations (public or private), exploitation of cultural resources could result in a sufficient and profitable level.

Furthermore, the results of the survey show that the promotion and advertisement of local cultural resources is not adequate mainly due to misuse of Internet marketing methods by the local authorities. There is substantial evidence from the results of the survey that the majority of the responders prefer the Internet and the social media in order to be informed for cultural activities. Moreover, our survey showed that the Department of Culture of the Municipality of Serres should take more responsibilities to advance local cultural development and play a more central role in local cultural resources exploitation, administration and coordination.

Regarding local cultural resources, the Bezesteni Archaeological Museum the most recognizable and most visited one while on the other side the Olive museum is the least acknowledged and visited one. The Olive museum is considered a wonderful cultural-natural resource and with the appropriate promotion from the local authorities can achieve higher recognition and attract more visitors.

An important part of our survey was the ranking of the importance of the factors that inhibit the advance of local cultural development of the Municipality of Serres. According to the results the poor road access and low quality railroad transportation that connects the city of Serres with the neighboring cities as well as the city of Serres with local sites of cultural importance (such as Amphipolis or the Kerkini Lake), and the low quality promotional activities are the two most important inhibiting factors. Additionally, the lack of a promotion to attract tourists outside Greece is of equal importance. On the other hand, the lack of a local culinary identity is considered not to be of great importance. Summarizing our survey showed that citizens realize that the Municipality of Serres has a substantial number of cultural resources, that are not yet sufficiently exploited. Citizens recognize the importance of cultural development in local economy and the value it can add in order to advance local economy as a whole. Of course, the study presented, is only a small step towards the understanding of how citizens perceive local cultural development, how they can benefit from it, what are the main driving factors behind its development and the factors that pose obstacles in further development.

It is certain that further work and research is needed in order to find more factors, both beneficial and inhibiting, to hierarchy these factors and discover new ways of exploitation of cultural assets.

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# Residents' Perceptions Toward Cultural, Social and Economic Benefits and Costs of Tourism Industry: An Empirical Survey

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and Dimitrios Belias

**Abstract** Tourism development plays a crucial role for the local economy and residents' quality of life, especially for Greece, a country suffering from financial crisis. The purpose of the paper is to examine attitudes of residents of a capital city at a prefecture of Central Greece that is Chalkida, the capital of Evia Island, toward tourism development. It was selected as it shares several similarities with most destinations of the neighboring region of Thessaly.

Factor analysis of scaled items measuring their attitudes resulted in eight tourism-related factors: beneficial economic, social and cultural influences, welfare impacts, economic cultural and social costs of tourism development and community support. Results indicate residents' expectations from tourism development were not met, as community support toward tourism sector is rather limited. Economic costs of tourism development exert detrimental effects on the welfare of residents, as well as their cultural and social context. In this way, tourism industry lacks community support and as a consequence a rather alienated environment for tourism developments is nurtured.

On the contrary, economic benefits are strongly and positively related to welfare, culture benefits, and community support on cultural or historic based tourism. Alike, welfare is associated with social and cultural benefits. Moreover, younger residents are less opting to support tourism development although they share the same perceptions about tourism development with older ones.

**Keywords** Residents • Attitudes • Tourism development • Culture • Welfare • Regional economy

**JEL Classification** L83 • M31

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## 1 Introduction

In the contemporary knowledge-based economy, tourism industry is considered a valuable source to the local economy and residents' quality of life; this is especially true for Greece, a country suffering from the consequences of the recent financial crisis and a country whose tourism industry suggests its heavy industry. Building on social exchange theory which postulates that one's attitude towards tourism industry, and subsequent level of one's support for its development, will be influenced by his or her evaluation of resulting outcomes in the community, this study explores residents' attitudes toward tourism development of a Greek capital city (i.e. Chalkida, the capital city of a Central Greece's prefecture). In particular, eight tourism-related attitudes were investigated referring to beneficial economic, social and cultural influences, welfare impacts, economic cultural and social costs of tourism development and community support.

## 2 Literature Review

According to Fayos-Solà (1996 in Da Graca Batista, Silva, & Martins, 2014), recent decades have witnessed a change in traditional tourism, with a move from mass tourism to alternative tourism. This reflects changes in the attitudes and needs of tourists, and these changes have become a challenge for players in the tourism market who have to manage and adjust their tourism resources to the needs of tourists, in order to maintain the competitiveness of the destination (Cracolici & Nijkamp, 2008).

Baud-Bovy and Lawson (1998 in Da Graca Batista et al., 2014) present the system of tourism based on the concept of "tourism product." The tourism industry does not develop in isolation; there are several external components that can influence the development of the industry and that interact with each other.

Tourism may be regarded as consisting of tourists, a business, and an environment or community in which this industry operates. If one is to understand the impact of tourism on residents, the inter-relationships between various elements in the system must be studied (Aspridis & Kyriakou, 2012; Williams & Lawson, 2001).

The WTO (1999) considers that tourism demand is extremely elastic, since a relatively small change in price or in income of tourists implies a change in demand in a greater proportion. Tourism tends to be a seasonal industry, and it is affected by a variety of subjective factors, such as taste and fashion. Tourism is widely perceived as a potential economic base, providing elements that may improve quality of life such as employment opportunities, tax revenues, economic diversity, festivals, restaurants, natural and cultural attractions, and outdoor recreation opportunities. There are concerns, however, that tourism can have negative impacts on quality of life. These can be in the form of crowding, traffic and parking problems,

increased crime, increased cost of living, friction between tourists and residents, and changes in hosts' way of life (Ap & Crompton, 1993; McCool and Martin, 1994 in Andereck, Valentine, Knopf, & Vogt, 2005).

There are several reasons why resident reaction to tourism is important, not least of which is the quality of life of the host community. Additionally commercial tourism ventures may be hampered or terminated by excessive negative resident sentiment toward this development (Williams & Lawson, 2001). If it is known *why* residents support or oppose the industry, it will be possible to select those developments which can minimize negative social impacts and maximize support for such alternatives. As such, quality of life for residents can be enhanced, or at least maintained, with respect to the impact of tourism in the community (Williams & Lawson, 2001).

Community consequences emerging from tourism development are often divided into three categories (Stylidis, Biran, Sit, & Szivas, 2014). First, economic, including elements such as tax revenue, increased jobs, additional income, tax burdens, inflation, and local government debt. Second, sociocultural, including elements such as resurgence of traditional crafts and ceremonies, increased intercultural communication and understanding, increased crime rates and changes in traditional cultures. Third, environmental, including elements such as protection of parks and wildlife, crowding, air, water and noise pollution, wildlife destruction, vandalism, and litter (Andereck, 1995 in Andereck et al., 2005).

Much of this kind of research occurred at the time of a reaction against what Jafari (1990) has termed the "tourism advocacy platform". During this period a number of cautionary statements about the benefits of the industry were appearing (Pearce, Moscardo, & Ross, 1996 in Mason & Cheyne, 2000). One of the most influential works was that of this cautionary period was that of Doxey (1975 in Mason & Cheyne, 2000), who proposed an irritation index, or "Irridex", in which four time-related stages are linked to increasing numbers of tourists. Doxey argued that as tourist numbers increase, resident populations react with increasing hostility toward tourists, and the population passes through stages from euphoria to antagonism. The models of Doxey (1975) and Butler (1980), Tourism Area Life Cycle (TALC) which suggests that if negative impact of tourism development decreases, residents of tourism destinations become more positive towards tourism development, propose a change in resident attitudes to and involvement in tourism over time (Liu, Shen, & Gao, 2015). Some of these attitudes can be seen in Table 1.

Eagly and Chaiken (1993 in Williams & Lawson, 2001) probably came closest to a definition that would satisfy the greatest number of researchers:

Attitude is a psychological tendency that is expressed by evaluating a particular entity with some degrees of favor or disfavor ... evaluating refers to all classes of evaluative responding, whether overt or covert, cognitive, affective, or behavioral (1993, p. 1).

As described by Ap, this is "a general sociological theory concerned with understanding the exchange of resources between individuals and groups in an interaction situation" (1992, p. 668 in Andereck et al., 2005). People engage in an interaction process where they seek something of value, be it material, social, or

**Table 1** Some Possible Antecedents of Resident Opinion of Tourism

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- **Distance of respondent's home** from tourism center (Belisle & Hoy, 1980; Pearce, 1980; Sheldon & Var, 1984; Tyrell & Spaulding, 1984): Belisle and Hoy found that the further the respondent lived from the tourism "zone", the more negative the attitude toward the industry. The other studies cited above found the opposite effect.

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- **Heavy tourism concentration** (Madrigal, 1995; Pizam, 1978).

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- **Greater length of residency** in the community (Allen, Long, Perdue, & Kieselbach, 1988; Brougham & Butler, 1981; Lankford, 1994; Liu & Var, 1986; Madrigal, 1995; Pizam, 1978; Sheldon & Var, 1984; Um & Crompton, 1987).

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- **Native-born** (of the town, city, county, or state) status (Brougham & Butler, 1981; Canan & Hennessy, 1989; Davis, Allen, & Cosenza, 1988; Pizam, 1978; Um & Crompton, 1987).

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- **Personal economic reliance** on tourism (Lankford, 1994; Liu & Var, 1986; Madrigal, 1995; Milman & Pizam, 1988; Murphy, 1983; Pizam, 1978; Pizam & Milman, 1986; Thomason, Crompton, & Kamp, 1979; Tyrell & Spaulding, 1984).

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- **Ethnicity** (Var, Kendall, & Tarakcioglu, 1985).

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- **Retail activity attributable** to tourism as a proportion of total retail activity (Long, Perdue, & Allen, 1990).

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- **Stage in Destination Area Life Cycle** or length of time in tourism market (Johnson, Snepenger, & Akis, 1994).

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- **Level of knowledge** about tourism and the local economy (Davis et al., 1988; Lankford, 1994; Pizam & Milman, 1986).

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- **Level of contact** with tourists (Akis, Peristianis, & Warner, 1996; Brougham & Butler, 1981; Lankford, 1994).

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- **Perceived impact** on local recreation opportunities (Lankford, 1994; Perdue, Long, & Allen, 1987).

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- **Gender** (Pizam & Milman, 1986; Ritchie, 1988).

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- **Perceived ability** to influence tourism planning decisions (Lankford, 1994).

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Source: Williams and Lawson (2001)

psychological. Individuals choose to engage in an exchange once they have judged the rewards and the costs of such an exchange. Perceptions of the exchange can be differential in that an individual who perceives a positive outcome will evaluate the exchange in a different way than an individual who perceives it negatively (Gursoy, Jurowski, & Uysal, 2002 in Andereck et al., 2005).

From a tourism perspective, social exchange theory postulates that an individual's attitudes toward this industry, and subsequent level of support for its development, will be influenced by his or her evaluation of resulting outcomes in the community. Exchanges must occur to have tourism in a community. Residents must develop and promote it, and then serve the needs of the tourists. Some community residents reap the benefits, while others may be negatively impacted. Social exchange theory suggests people evaluate an exchange based on the costs and benefits incurred as a result of that exchange. An individual that perceives benefits from an exchange is likely to evaluate it positively; one that perceives costs is likely to evaluate it negatively. Thus, residents perceiving themselves benefiting from tourism are likely to view it positively, while those not, negatively (Andereck et al., 2005).

There is increasing evidence that residents of communities that attract tourists hold diverse opinions about development in their region. This diversity of opinion has sparked increasing amounts of research into resident attitudes over the past two decades (Mason & Cheyne, 2000).

### 3 Methodology

The sample population consisted of individuals who reside in Chalkida, the major central city of Evvoia Island, in Central Greece. It was selected using a convenience sampling approach, based on responses of residents and shop owners at the Central Streets, a central shopping and leisure location, during April 2015. However, the sample was tested for the representation of age groups and it was found to be in alignment with the total population. A self-administered structured questionnaire was used to collect data. A total of 141 usable questionnaires were collected for a response rate of 28 %. However, for the purpose of this research, returned questionnaires with missing data were eliminated from the analysis, in order to eliminate any bias imposed to statistical findings due to missing values (Hair, Anderson, Tatham, & Black, 1998). Therefore, 128 responses with complete data were retained for the analysis.

All measures of the structured questionnaire developed were based on established and validated instruments on the relevant literature. Respondents were asked to indicate their agreement or disagreement with the statements that measure perceived impacts on a 7-point Likert type totally agree–totally disagree scale. More specifically, similar items with those used to measure the positive and negative perceived impacts of tourism development, and community support can be found in surveys conducted by Liu, Sheldon, and Var (1987), Akis et al. (1996), Teye, Sonmez, and Sirakaya (2002), Gursoy et al. (2002), and Gursoy and Rutherford (2004).

### 4 Results

With respect to selected sociodemographic characteristics of the respondents, the majority of the respondents were female (53 %). The majority of the respondents (73 %) indicated that they were born in the city where they reside, in Chalkida. Also, the 71 % of the respondents have lived for more than 30 years in the same community. Additionally, the 52 % hold a college degree, and the majority (72 %) had monthly wage of less than 800€ (the 97 % had less than 1200€ monthly payment). The work of the majority (53 %) was not related directly or indirectly to tourism. The 89 % of the sample have the Greek Nationality.

A varimax rotated principal component analysis was used on 33 items describing tourism benefits, costs and community support in order to extract general groups of

resident attitudes toward tourism. Kaiser–Meyer–Olkin statistics of 0.67, the significance of Bartlett’s Test of Sphericity ( $p < 0.001$ ) and the inspection of correlations among the items indicated that the data was suitable for a factor analysis. A cut-off point of 0.40 was used to include items in the interpretation of a factor. Factor loadings were inspected and solutions improved by deleting items that either loaded on several factors or had low loadings. Therefore, these items were dropped from further analysis. After several runs, the data revealed eight distinct principal components with eigenvalues greater than one, explaining 65.8 % of the variance in the original data set.

These eight factors were labeled as cultural cost, social cost, cultural benefit, economic benefit, welfare, economic cost, social benefit and community support.

The eight conceptually meaningful domains from the factor analysis results were then tested for reliability, which was assessed by Cronbach’s Alpha coefficients. The coefficients ranged from a high 0.84 to a low 0.59, indicating that the variables exhibited moderate correlation with their factor groupings and thus may be cautiously regarded as internally consistent and stable. Table 2 displays items’ factor loadings, eigenvalues, percentage of variance explained by individual domains, and corresponding alpha reliability coefficients.

Results indicate residents’ expectations from tourism development were not met, since community support has scored relatively low (mean = 2.26, SD = 0.471).

## 5 Discussion

Performing correlation analysis, economic costs of tourism found to be negatively related to economic benefits ( $r = -0.214$ ,  $p < 0.05$ ), welfare ( $r = -0.238$ ,  $p < 0.05$ ), social benefits ( $r = -0.234$ ,  $p < 0.05$ ), and cultural benefits ( $r = -0.405$ ,  $p < 0.001$ ). Similarly, cultural costs are associated negatively with community support on nature based tourism development ( $r = -0.281$ ,  $p < 0.01$ ).

Thus, economic costs of tourism development exert detrimental effects on the welfare of residents, as well as their cultural and social environment. In this way, tourism industry lacks community support nurturing a hostile environment for tourism development in the region under investigation, due to its impact on the social, cultural and economic context. This finding is in alignment with social exchange theory which assumes that potential beneficial or negative outcomes will create positive or unconstructive attitudes toward tourism (Andereck et al., 2005).

On the contrary, economic benefits are strongly and positively related to welfare ( $r = 0.600$ ,  $p < 0.001$ ), culture benefits ( $r = 0.216$ ,  $p < 0.05$ ), and community support on cultural or historic based tourism ( $r = 0.241$ ,  $p < 0.05$ ). Alike, welfare is associated with social ( $r = 0.227$ ,  $p < 0.05$ ), and cultural ( $r = 0.295$ ,  $p < 0.01$ ) benefits. In a similar vein, social benefits are positively linked with cultural impacts ( $r = 0.350$ ,  $p < 0.001$ ).

Therefore, residents’ welfare is driven by economic, cultural and social benefits of tourism fostering community support on the relevant tourism development of cultural

**Table 2** Results of PCA for tourism benefits, costs and community support

	Cultural cost	Social cost	Cultural benefit	Economic benefit	Welfare	Economic cost	Social benefit	Community support
Item 1						-0.735		
Item 2						-0.777		
Item 3		0.851						
Item 4		0.888						
Item 5		0.835						
Item 6	0.763							
Item 7	0.885							
Item 8	0.872							
Item 9	0.793							
Item 10	0.613							
Item 11				0.598				
Item 12				0.673				
Item 13				0.757				
Item 14				0.717				
Item 15					0.600			
Item 16					0.784			
Item 17					0.674			
Item 18					0.656			
Item 19							0.509	
Item 20							0.693	
Item 21							0.665	
Item 22			0.779					
Item 23			0.822					
Item 24			0.624					

(continued)

Table 2 (continued)

	Cultural cost	Social cost	Cultural benefit	Economic benefit	Welfare	Economic cost	Social benefit	Community support
Item 25			0.571					
Item 26								0.551
Item 27								0.688
Eigenvalues	4.060	3.287	2.388	2.009	1.891	1.543	1.336	1.253
% of total var.	15.04	12.18	8.84	7.44	7.00	5.71	4.95	4.64
Cumulative % of total var.	15.04	27.21	36.06	43.50	50.50	56.22	61.17	65.80
Cronbach's alpha	0.839	0.838	0.709	0.719	0.689	0.611	0.605	0.593
Mean	1.77	3.86	4.90	6.36	5.67	2.78	4.54	2.26
Std. dev.	0.719	0.807	0.566	0.668	0.621	0.641	0.454	0.417

Rotation: Varimax normalized, factor loadings above 0.45 are highlighted, Valid N: 128



and historical heritage. Results provide supporting evidence to the social exchange theory's hypothesis. Given that residents evaluate favourably the resulting outcomes in the community from tourism activities, they will reciprocate as in exchange by promoting and supporting tourism development (Andereck et al., 2005). Then, community serves the needs of the tourists and advances tourist 'experience'.

It is interesting that no statistical differences comparing for other demographic variables such as gender and age were detected for respondents' attitude towards tourism benefits or costs (*t*-test analysis). This finding is in alignment with Liu and Var's (1986), for the impact of demographic variables on residents' attitudes toward tourism. On the contrary, and in partial support with Teye et al. (2002), respondents aged more than 35 years old are more inclined to support tourism development than the younger ones ( $p < 0.05$ ). Perhaps, given that elders are possibly more tied with the local community, and are characterized by higher levels of community attachment and concern, interaction with tourists strengthens their cultural identity and fosters their support to tourism development.

## 6 Conclusion

The findings of this study indicate a number of important conditions which are essential to the understanding of residents' attitudes toward tourism in Chalkida, the capital of Evia Island which shares many similarities with capital cities of the Thessaly Region such as Larissa (both prefectures located at Central Greece). Moreover, Chalkida is almost 1.5 h far away from Athens, the Capital of Greece, as long as Larissa is far from the second largest city in Greece, Thessaloniki. In practical terms, these two cities are similar in terms of their economic, social, and governmental structures.

To summarise, this research provides striking evidence for the social exchange theory. Residents assess favourably the economic, cultural and social benefits of tourism, and as a result in exchange they support and promote the relevant tourism development of cultural and historical heritage. On the contrary, economic costs of tourism development exert detrimental effects on their cultural and social environment leading to lower level of welfare, and lack of community support.

It is also interesting that elder residents are more opt to support tourism development, as they value its impact on the social and cultural context, as well as on community attachment and concern through the interaction with tourists. In this way, tourism development may strengthen residents' cultural identity and foster their support to tourism development.

Several limitations restrain the ability for generalization and interpretation of our findings to other contexts and circumstances, such as sample size, in Greece, a country with specific national culture characteristics. Also, the cross-sectional approach and correlation analysis performed can not investigate causal relationships and thus prevent such inferences. In addition, the conceptual model of this study may include a number of variables affecting residents' attitudes such as community concern, community attachment, and residents' engagement.

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**Part II**  
**Emerging Forms of Tourism**

# Multilingual Online Communications in Corporate Websites: Cases of Romanian Dental Practices and Their Application to Health Tourism

Felicia Constantin and Androniki Kavoura

**Abstract** Health is for the modern citizen an ongoing and almost obsessive concern. The process of globalization, which dissolved physical boundaries and allowed the mobility of people, favored the development of health tourism which has seen a real boom and became a social and economic phenomenon that is extremely interesting. In this context, dental care tourism begins to solidify in countries like Romania, because of its competitive price and the quality of services. Therefore, the communication in this environment has to adapt by its new forms, with the demands of potential foreign patients and become an international communication. The limited research in the dental field associated with the provision of online communication in order to reach potential customers offers ground to this exploratory research. This study employs content analysis to explore rated websites of dental practices of the cross-border region of Romania. Findings reveal features that ensure the informative function but which are able to increase the visibility of the dental practices across national borders through multilingual online communication.

**Keywords** Health tourism • Dental websites • Multilingual online communication • Romania

**JEL Classification** M3 • M37

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## 1 Introduction

Health is today for the modern citizen, more than ever, an ongoing concern. The process of globalization, which dissolved physical boundaries and allowed the mobility of people, favored the development of health tourism which has seen a real boom (Esnard, 2005; Turner, 2008; Loh, 2015) and became an extremely interesting social and economic phenomenon while empirical research is rather scarce.

Proulx (2005, p. 13) affirms that “the postmodern individual seeks a better quality of life, he takes care of his health, the health of the body and mind. Vacation and tourist departure are part of the needs that must be met to see his health and well-being”. According to Esnard (2005, p. 2) “offshoring care, because that’s what it is, is supposed to revolutionize the habits of Westerners in leisure and surgery”.

If we speak about a great deficit of practitioners—doctors and assistants—in the Romanian general health system care and in the specific field of the dental care, the specialists observe the abundance of the graduates and the overcrowding of the cities. In a Romanian national journal, M. Panțel, the former President of the Association of Private Practice Dentists in Romania declared that “Dentists could no longer penetrate the local market. How shall I put it, it is not that there are few positions available, there are no positions at all”. According to him, the rural areas are not an option: “Although there are needs, patients do not have money to go to the dentist, and the state no longer provides funds to cover treatments” (Chiruta, 2013). The motivation of dentists who choose to continue their work abroad is complex, related to their future intentions, job satisfaction, financial reason or the possibility to work with the latest technology. For D. Perețianu, former President of the Federal Chamber of Physicians in Romania, the migration is not due necessarily to wages, but to lack of corruption, of arbitrariness and to the existence of clear, transparent forecasts for a career. He notes that the number of graduates is too big: “10 years ago there were 5000 dentists are now they are over 15,000. Too many” (Chiruta, 2013).

In Oradea, Romania, there are several hundred dentists and dental practices. The Faculty of Medicine and Pharmacy of the University of Oradea forms every year more and more new generations of dentists. The market is open and there is no limitation in the industry, as it happens for example in the case of notaries. In this context, we can talk about a fierce competitive environment, which is accompanied by a decrease in the possibilities of patients. This social and economic status forces doctors to find other ways to find and keep patients. This results in doctors and dentists seeking alternative ways to perform their profession seeking international patients. Health practitioners do not only work in their countries but due to the economic crisis they aim to attract people from foreign countries who come as health visitors in the respective country (Hanefeld, Lunt, Smith, & Horsfall, 2015). In order to do so, they need to put emphasis on their promotional and communication activities, which have to be appropriate to an international market. The aim of the paper is to explore multilingual online communication in Romanian dental websites and their application to health tourism.

## 2 Literature Review

### 2.1 *Medical Tourism and Its Target Audience*

Since 2008 when the economic crisis became more evident, prices have become more affordable for patients to travel to eastern countries for medical services than to other western countries as is the case of Hungary for example (Kovacs & Szocska, 2013) or Romania (Constantinescu-Dobra, 2014). These countries may have a leading position in dental tourism, for the benefit of patients, health professionals (private practices or private clinics), the tourism stakeholders (owners of guesthouses and hotels, restaurants or travel agencies).

It was observed by Le Borgne that the countries of Eastern Europe have become ‘Europe’s best in dental care’:

“Very quickly, benefiting from skilled and numerous professionals, Poland, Hungary, Romania, Bulgaria and the Czech Republic were able to take advantage of the different rates between East and West and propose, to a lot of persons, dental procedures accessible to all budgets: [...] from aesthetic laundering to implant placement (two techniques that are not reimbursed by health insurance in France) including crowns and care, for prices well below the Spanish ones” (Le Borgne, 2007, p. 48). Research has shown that there are different groups of medical tourists, with different motivations and people in charge of promoting medical tourism should take this into consideration (Wongkit & McKercher, 2013).

Firstly, Europeans for whom treatment services and cosmetic dentistry are too expensive in their countries, have more possibilities to organize their trip in another country: they can appeal to specialized travel agencies in dental tourism, who offer integrated packages with accommodation, transport, meals and insurance. Hanefeld et al. (2015) argue that facilitators may contribute so as potential medical tourists’ needs are catered so that their trip to a destination in regard to received medical treatment is well organized. Tourists may request references from people they know who have been treated satisfactorily in another country in regard to health tourism. Literature has illustrated that opportunities in medical tourism are diffused by word of mouth but also the internet has a role to play in the promotion of medical tourism (Connell, 2013; Yeoh, Othman, & Ahmad, 2013). Dental setups may employ the word of mouth that is associated with information messages, comments and online presentation of personal experiences as a marketing communication tool (Srivastava & Mahajan, 2011) while patients use the internet as the main source of information in addition to personal experience, advertisement and publicity provided from medical organizations and doctors (Yeoh et al., 2013).

In addition, tourists on holiday, in business or in transit may search the medical services in another country. Furthermore, diaspora’s people—those living abroad—may return to their country as medical tourists, as literature has shown (Connell, 2013; Hanefeld et al. 2015; Sarantopoulos, Katsoni, & Geitona, 2014). Thus, those concerned with dental health issues, may search information online for the related services provided.

A lot of tourists can choose and organize their voyage simply on their own and they base their search on Internet resources. The development of media strategies which is among the most important sources of information, provides in detail information that a potential medical tourist may need (Sarantopoulos et al., 2014).

According to the National Institute of Statistics of Romania (2015), 8.5 million foreign tourists entered Romania in 2014, an increased number as compared to 2013; the top ten countries in Europe are Germany, Italy, France, United Kingdom, Hungary, Spain, Poland, Austria, Netherlands and Bulgaria. To the authors' best knowledge, there is no study to affirm with certitude the number of "dental tourists in Romania" but considering those travelling for medical dental treatment in many other places, we may argue based on the scarce literature, that tourists could become patients (Kiss, 2015).

Under specific circumstances, they may become patients in dental practices in Romania. The geographic location in a border area is likely to attract foreign tourists in a practice. This is where the city of Oradea is located, on the border with Hungary, with the border crossing point Bors. Oradea is the municipality of Bihor County, the second largest in terms of GDP, in the North West of Romania and the 10th among counties in terms of contribution to national GDP (Consiliul Județean Bihor, 2014). The town is located 10 km from Baile Felix Thermal Spa that is the only balneo-climateric resort in the north-west of Romania (Planul de dezvoltare regională Transilvania Nord 2014–2020, 2015, p. 130), and in a region with a great potential due to an innovating rural tourism (Bugnar & Meșter, 2008, p. 329). Despite the unquestionable tourism potential of the domain, the Strategy for the development of Bihor County never mentions dental tourism.

## 2.2 *Websites as Innovative Communication Tools in Medical Tourism*

The Internet website is a communication tools which contributes to the promotion and advertisement of a company's or an organization's services and products and it is in fact its mirror. The experts highlight the internet ability to ensure business sustainability and maximize the potential development of a business, so for a dental practice "online presence is the key to the process of communication with customers [...] Where else does a company have the opportunity to earn millions of consumers with a significantly cheaper cost than that of the traditional forms of advertising, if not on the internet?" (Grosbeck, 2006, p. 210).

It was revealed by V. Cepoi, state adviser to the Prime Minister of Romania, who declared in July 2013 in the International Medical Travel Journal, that

Thousands of people are treated in dental clinics here, which they promote by themselves. The foreign patients pay a quarter of what they would pay for these services in their countries. Thus, there is an opportunity for wider Romanian medical tourism. In spa and health tourism there is still a significant potential for growth. [...] We have resources, we are motivated and we want to develop this activity to the benefit of the patients from Romania, from Europe and from anywhere in the world (<http://www.imtj.com/news/?entryid82=424423>).



Tourists come mainly in offices and private clinics, not in state hospitals. Therefore, professionals must develop their own communication strategies. Internet is of special interest to the tourism industry since websites may be the first and only contact with the potential customers from another country. Traditionally, and in the local context, medical offices can take advantage of their presentation and their communication activities in brochures and catalogs, such as the Yellow Pages type. Nonetheless, dentists have begun to realize that new innovative techniques of communication such as online communication over the Internet has become today the only viable way to increase their clients and retain them (Cormany & Baloglu, 2011; Romano & Baum, 2015). In the specific study, the internet can highlight the advantages of the services in the Romanian practices.

WorlDental.org which is defined as “a popular dental health web magazine created for people who take care of their smile, oral and overall health”, in the article “Cheap Dental Tourism Growing Fast in Romania”, remarks that

Romania will become one of the most affordable spots for dental tourism because patients will encounter affordable prices for top dental services; they have relatively short dental treatment periods; dental offices are equipped with top medical technology devices; the dental professionals are very well trained; huge innovations in the field of cosmetic dentistry are also on the line. This is particularly important, since cosmetic dentistry is the most expensive dental practice in highly developed countries, and it is a service which is usually never covered by a standard insurance policy (<http://www.WorlDental.org>).

The real challenge is presented today because of foreign tourists. Based on a survey, coordinated by the European Commission, Directorate-General for Communication in the 27 Member States of the European Union and in Croatia between 24th May and 9th June 2013, the use of online social networks was highlighted with Germany to use social networks at a percentage of 50 %, Italy at a percentage of 50 %, France at a percentage of 54 %, United Kingdom at a percentage of 57 %, Hungary, at a percentage of 61 %, Spain at a percentage of 58 %, Poland at a percentage of 52 %, Austria at a percentage of 58 %, the Netherlands at a percentage of 61 %, Bulgaria at a percentage of 64 % (Eurobarometer, 2013). Thus, there is a huge potential based on the number of incoming tourists but also due to the fact they use online social networks for Romanian dentists to employ Internet in their communication campaigns to raise the number of medical tourists.

The offer exists or it can be created; the high quality of services is associated to very interesting prices. What should be highlighted is the channel of transmitting information. Previous research on marketing of dental services has identified brand awareness, service information, targeting of people, feedback tools as essential items that one interested in employing internet as a tool should take into consideration (Constantinescu-Dobra, 2014). The same author affirmed that the results on the use of internet as a marketing tool in Romanian dental industry in comparison to print advertisements, showed that although dentists tend to have an online presence, this is limited to the use of basic elements (Constantinescu-Dobra, 2012).

Nevertheless, websites today are complex devices that combine research, development, innovation and safety: they provide scientific information and especially teaching. Internet is used as a marketing tool providing a way of connecting 'customers' to 'sellers' of health-related services (Geangu, Orzan, Gardan, & Geangu, 2010; Romano & Baum, 2015). Creating a website is an excellent solution to become visible, together with other means which complete the informative role: multilingual website versions (English, Italian, Hungarian, French or German), use of a logo and of a slogan, blogs, different facilities of the websites (pictures, videos, calendar, search options, application for smartphones), testimonials and online guestbooks.

This research adds to the existing literature in regard to the way multilingual online communication takes place from dentists to reach diverse populations (Turner, Kirchhoff, & Capurro, 2012) focusing in the area of Oradea, Romania. Taking one step further from Kavoura and Constantin's (2015) analysis of dental practices websites in Oradea and the adherence or not of a regulatory framework associated with communication about health services so that Romanian people may be informed about dentists' practices, this research explores the presence of multilingual online communication directed to foreign people. The demand side for health services may come from abroad and communication activities on offer may take into consideration language barriers.

The new framework strategy for multilingualism recognizes the role of the foreign languages in the economy and posits that "increasing citizens' language skills will be equally important in achieving European policy goals, particularly against a background of increasing global competition" (European Commission, 2005, p. 14). Conceived for the international trade, the ELAN study concluded that "a significant percentage of SMEs (small and medium-sized enterprises) across the EU and the wider Europe are losing export business through lack of language skills" (ELAN, 2006, p. 57). One of the final recommendations is to do or implement further research into "the impact of language skills on other areas of the economy, for example: Tourism" (idem, p. 60), we consider that the present study deepens the conclusion of a study that argued that the Romanian tourism is a genuine interest to the international world with clearly defined strategic lines, but unfortunately doesn't have the same openness to foreign languages, that are a vehicle in the international communication (Constantin, 2014a). If for example, hotels, directly interested in a international communication, ignore the potential of a multilingual website, a solution yet simple, quick, inexpensive, durable and very profitable (Constantin, 2014b), should the dental practices pay more attention to the multilingual communication, which is essential for receiving foreign patients?

### 3 Methodology

In order to answer to this question, we used the content analysis which is “a technique for gathering and analyzing the content of text. The content refers to words, meanings, pictures, symbols, ideas, themes, or any message that can be communicated” (Neuman, 2003, p. 219). In the specific study, the researchers sought words and phrases in foreign languages, as they were specified from the themes associated with the online multilingual communication in Romanian dental websites. This took place in the so called direct way, those words or phrases that are physically present and counted rather than on the latent content which depends on the subjective judgment in order to lead to reliable results (Leiss, Kline, Jhally, & Botterill, 2005; Robson, 2010, pp. 420–421). The study is exploratory and aims to examine the way dental websites present online multilingual communication in order to present their services to the potential foreign tourists. This pragmatical research puts emphasis on:

- the analysis of themes emerged in the literature such as the emphasis put on the communication of information in other languages—apart from Romanian—through the existence of multilingual website versions (English, Italian, Hungarian, French or German),
- submission of a button for ‘events’ fed with pictures and videos of the dentist being involved in social campaigns,
- detailed information about medical tourism that may make the trip of a foreign tourist easier to organize.

The collection and analysis took place between since December 2014 for the city of Oradea, Romania. Based on three sites portals that Romanian dentists use to promote their practices (<http://www.dentistonline.ro>; <http://www.medicistomatologi.ro>; <http://www.cliniciimplantdentar.ro>) and taking into account the Google ranking algorithm for Oradea’s dentists’ online presences, the authors selected to content analyze those sites from the portals that were in the first ten positions for a period of 5 months (<http://www.seomark.co.uk/how-does-google-rank-websites/>). At the time of writing this paper (May 2015) and for an ongoing period of 5 months, the authors observed the online presence of these sites that continue to have the same ranking as they had 5 months ago.

Herring (2004) notes that in computer mediated discourse analysis, sampling is rarely done randomly, since random sampling sacrifices context. In that way, textual analysis can take into consideration ongoing participant observation of online communication.

## 4 Results

In the case of the ten sites analyzed, we remarked the presence of the following elements related to the multilingual communication and the application to the health tourism.

### **Multilingual Website Versions**

The websites analyzed reveal that only three sites take into consideration the potential of a multilingual communication and present the information in other languages. The languages used are English, Italian, German and Hungarian. All the sites use English, because it's a global language used as lingua franca in economy (Graddol, 2006, p. 30). In regard to the other languages, Italian, Hungarian, French or German are chosen in relation with the nationality of the potential patients.

It is typical to note that two practices have multilingual sites, active and updated. Besides English, they are edited in Italian and Hungarian; only one site has a version in German and in French. It was found that one site exposes flags, symbols of foreign languages without the use though of specific content. There seems to be an indifference for the multilingual communication, as it is proven by the sites of dental practices, although it is a cheap and quick solution that could revitalize the promotion of dental tourism to foreigners. It is noticed that none of the site has a version in rare languages like Chinese or Russian. Furthermore, the multilingual versions of the websites may underlie print promotional material.

### **Presence of Logos and Slogans**

Two sites don't have a logo, while the other eight have a simple logo, representing a stylized letter (two practices) or an artistic tooth (or two teeth, in different colors). The slogans are in Romanian language and only two of them are in English, so created for foreign patients too: "Creating a beautiful smile" and "What a smile". The existence of a name and of a slogan in foreign language or easily understandable by foreigners is the sign for the existence of a strategy of communication oriented to foreign patients.

### **Testimonials and Guestbooks**

One site provides photos and testimonials of the patients; the statements would have greater impact if they were made in foreign languages. The presence of the section Guestbook on another site is a proof that this element has a potential impact on the patient's reception, because the personal experience is more relevant than any advertising. A real dialogue between the doctor and the potential foreign tourist is provided (<http://www.oradea-stomatolog.ro/intrebari-si-raspunsuri>). This does not include information about dental and health care issues but information about travel details. Travel details are very significant for medical tourists (Sarantopoulos et al., 2014; Wongkit & McKercher, 2013) and this exploratory research adds to the existing literature.

### **Provision of Information for Medical Tourism**

In regard to the provision of information that would help potential visitors from other countries to come to Oradea with the view to receiving health services provided here, there are only two sites of the ten analyzed that provide information based on accommodation, prices and other important elements a potential visitor may need to initiate a trip. Two trends are noticed: on the one hand a multilingual presentation of the medical tourism made in foreign languages and on the other hand a detailed presentation made only in Romanian language.

In particular, on the site of the practice *Dental Art* we find the presentation of the practice in relation with the health tourism in English, German, Italian and Hungarian language: “Many patients choose to combine the dental treatment with a holiday, especially coming from countries where dentistry is practiced at much higher prices than in Romania. We have patients from Italy, England, Germany, France, USA as well as the Nordic countries. They benefit from our premium priced services at the same prices where at home they would benefit for only social treatments. At the same time they have the opportunity to relax by visiting the Apuseni Mountains or spend time at the thermal baths in Felix” (<http://www.dental-art.ro>).

All the booking steps are presented on the site, the foreign patients have to use a Contact form and to provide a panoramic x-ray in order to obtain a treatment plan with prices. The plan is approximate and only an estimation of the costs for future treatments can be provided. The practice offers information for the organization of the trip: flights, accommodation, local transport and even tips on what one could visit. Specific names regarding accommodation are provided rather than indicating a general site where one can choose where to stay.

Another trend is to conceive a special section dedicated to the Medical tourism offer, but all information is in Romanian language. The organization of the information provides a series of practical information relative to the transport and accommodation, with reference to the prices charged, and includes a reproduction of a virtual dialogue between the doctor and the potential foreign patient, on subjects like prices, advantages, accommodation, nationality of patients, language skills of the doctors.

## **5 Conclusion**

This research is part of a wider research which aims to illustrate the role websites may have in order to attract foreign patients as potential customers of dental practices and the way multilingual online communication takes place. According to Claeysen (2009, p. 15), in the virtual network, a company can turn its activity “into a powerful virtual business relationships”, producing “a revolution of mentalities and behaviors” and making possible “a velvet revolution patterns, devices and methods of sale and communication”.

A good site would have to accomplish an informative role, but it has to provide the information in a specific way, modern and interactive, appropriate for national and international potential patients. Readability of websites associated with medical issues and in particular dental ones is also important so as patients to be able to read the information provided (Jayaratne, Anderson, & Zwahlen, 2014). In addition, websites should be continuously updated (McLeod, 2012). Healthcare marketing activity on the internet has become a more important strategy in the last decade for dental providers and the use of websites is an efficient marketing tool for bringing closer patients to dentists. Research on the online communication and dental websites may add to the limited existing literature (Turner et al., 2012) and this research explored the case of Oradea, Romania. The new and innovative tools are generally ignored by the websites of dentist's practices in the town of Oradea, including the first ten websites that were better referenced. Despite this, they could attract foreign tourists with a better presentation of quality services and competitive prices and stop or slow down the migration of Romanian dentists to France, England, etc. The few websites analyzed is a limitation of the research. Dental tourism issues emerged and further research needs to be done to reach generalizable results.

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# Hospitality—Medical Tourism: The Civil Responsibility of Tourist Service Providers

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**Abstract** Medical tourism is a market which grosses US\$100 billion globally. An industry which can benefit from this activity, besides the health sector, is hospitality, since it can be an answer to tourism seasonality. Targeting this public, hotels seek to supply their necessity, and 24 h medical care is among them. The hotel responsibility related to third-party services comes into question, since medical care is not part of the hospitality sector routine. In Brazil, there is no legislation obliging hotels to have this kind of service, but this means adding a competitive edge to the service destined to a public with different characteristics from the regular tourist. When the hotel hires the medical services of a company, they share responsibilities, and the hotel is liable for almost everything during the medical assistance. The hotel is not responsible for the mistakes resulting from the medical professional activity.

**Keywords** Tourism • Health • Hotel • Responsibility • Service

## 1 Introduction

As it is known, medical tourism is a growing global phenomenon, and it is estimated that this industry is worth US\$100 billion globally (Consumer Health, Our, & Our Community, 2013). Proponents generally envision how medical tourism can be used by destinations to attract foreign exchange, improve health care and tourism infrastructure. Correspondingly, medical tourism has been actively

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embraced by governments and private-sector actors in a growing number of lower- and middle-income countries as a potentially powerful economic growth engine (Ormond, Mun, & Khoon, 2014).

According to Brazil's Ministry of Tourism, medical tourism appears as an alternative to tourism seasonality, because it allows a larger flexibility for the promotion of preventive and curative health care not linked to those periods of the year typically allocated to traveling (Ministério do Turismo, 2010b). As highlighted by the Brazil's Ministry of Tourism, the rising concern about health and wellness boosts tourism as an alternative for the social and economic development of the regions. In 2009, the expectation for an annual sustainable growth for the industry was estimated in 35 % for the following years (Deloitte, 2009). According to a publishing by EMBRATUR (Brazilian Tourism Institute), in 2014, the forecast for the impact of tourism on Brazilian economy was 9.5 % of GDP (Gross Domestic Product) (R\$466.6 billion), a growth of 5.2 % comparing to the previous year. The number is higher than the world average, 2.5 %.

In relation to the entrance of foreign tourists in Brazil, Ministry of Tourism data shows that, in 2006, 0.61 % of them came because of health issues, what corresponds to a total of more than 30,000 tourists. In the following year, this number rose to 59,000 tourists, that is, 1.17 % of the total of visitors. However, in 2008 there was a decrease in the index in relation to 2007. Despite of that, the average of tourist entrance in Brazil related to health was 0.78 % among 2004 and 2008 (Ministério do Turismo, 2010a). The medical tourist spends as much as US\$300.00 per day (without considering medical expenses) (UOL, 2011). Another interesting piece of data is that 80 % of the tourist patients travel accompanied (Ministério do Turismo, 2010a) and stay around 22 days in the place of destination (Vicentini et al., 2010).

A sector that can beneficiate from the growth of medical tourism is the hospitality industry. The average stay over of hotels in Porto Alegre city for the first semester of 2014 was 55.32 %, varying from 46.7 % in February to 62.29 % in June (Secretaria Municipal de Turismo Porto Alegre, 2015). This increase follows the intensification of the events calendar (Secretaria Municipal de Turismo Porto Alegre, 2015). There is an idle capacity which should be exploited. Medical tourism can be the answer.

Once this segment was identified, we have to pay attention to some of its characteristics. The medical tourist can stay in their destiny after the treatment, which involves differentiate products and services.

In Vicentini et al.'s work (2010), it is stated that among the patients "medical wishes" is the desire for having nurses working 24 h a day. It is not economically feasible for a hotel which services tourists in general and the medical tourist to have a nurse staff on shift. In this way, the alternative is the outsource of this service through the hiring of companies providing domestic medical care. In Brazil, there is no legislation obliging hotels to have this kind of service. Thus we have this questioning: if the hotel offers medical care aiming to attract medical tourists, what is its responsibility related to the medical and nursing service offered by the outsourced company?

This concern is warranted when we look at the following data: lawsuits involving physicians (medical error) increased in 140% in 4 years (from 260 in 2010 to 626 in 2014) (Cambricoli, 2015).

To answer to this question it is necessary to analyze the Brazilian legislation related to the responsibility of service suppliers and providers in relation to the consumer and, specially, the hotel responsibility in relation to the services it offers to its guests.

Before analyzing these services, such as medical, ambulatory and emergency care, with ambulances which take the patient to hospital, it is necessary to make clear that Brazilian legislation recognizes the mutual accord of all suppliers<sup>1</sup> which make part of the chain of determined service, according to the Brazilian Consumer Protection Code—Act no 8,078, of September 11, 1970. This Code is considered one of the best in the world (Tuon, 2013).

## **2 The Civil Responsibility of Tourist Service Providers According to the Consumer Protection Code**

In the case of tourist services, travel agencies and other service providers, such as hotels and tourist transport companies, make part of a chain of service providers which respond mutually to the consumer, with strict liability, according to the Consumer Protection Code.

To be mutually charged for the indemnity due means that all respond to the consumer's damage. For example, a travel agency sells a tour package including lodging, and it is responsible for the possible indemnity asserted by the tourist in the case of bad service at the hotel. This consumer can go to the law against the travel agency which sold the package since this is also responsible for the lodging services offered by the hotel (its partner).

Strict liability means a responsibility in which the existence of malice (intention) or the service provider's guilt for the damage caused is not questioned. It is only necessary that some harm has been caused to the consumer resulting from an action or omission by the service provider to justify indemnity.

In this way, imagine that a particular hotel promises to offer the tourist a specific service and, during the tourist stay, the service is not rendered when asked by the guest, causing a patrimonial or moral delict. In this case the service provider was

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<sup>1</sup> Brazilian Consumer Protection Code, article 3: Supplier is any public or private, national or foreign individual or body corporate, as well as entities without a legal identity carrying on business in the field of production, assembly, creation, construction, transformation, import, export, distribution or commercialization of products, or rendering of services.

Paragraph 1.—Product is any movable or immovable, material or immaterial asset.

Paragraph 2.—Service is any activity offered in the consumer market subject to remuneration, including those of banking, financial, credit and insurance nature, except those resulting from a labor relationship.

negligent, resulting in a delict for the consumer. According to the strict liability, since there is a connection between negligence and damage, that is, if the tourist's damage really happened because of the hotel negligence, indemnifying is obliged.

We should highlight that the Brazilian Consumer Protection Code lists several consumer basic rights, which should be respected by the service providers or good suppliers, at the risk of liability if a delict happens.

It is important to register that, according to Article 6 of the Brazilian Consumer Protection Code, these are consumer's basic rights:

- a) Appropriate and clear information about the different products and services, and correct specification as to the quantity, characteristics, components, quality and price, as well as to any risks they might involve (paragraph III) This means that when someone buys a tourist package, for instance, this person has the right to know in which hotel they are staying and for how long, which services are included, at what time transfer services are rendered, what is the environment like, to help select appropriate clothes and equipment, etc. Mamede point out that:

It is easy to notice the warrant present at article 6, III: it serves both to the contracting party/consumer and the tourist, beneficiary of the contract, even if they are different people. Law warrants the contracting party/consumer the right to detailed specification of the contractual object, that is, the adequate delimitation of all elements and all one-offs for the obligations assumed by the supplier and by their partners in the supply chain. It is the customer's right, therefore, to know everything they are paying for, which allows them to (1) judge if they want to hire the service or not and, closing the deal, (2) require each detail of what has been set. The contract beneficiary also profits because they are the ones who effectively consume the product; in other words, who uses the good acquired or beneficiates directly from the service rendered. (author's emphasis) (Mamede, 2004).

- b) Protection against misleading and abusive advertising (paragraph IV). Because of this right, all services offered by the enterprise, be it through advertising in several kinds of media, be it due to a forecast in the closed contract, should correspond to what is effectively rendered to the consumer.

Likewise, article 6 recognizes as consumer's basic rights:

- a) effective prevention against and redress for individual, collective or diffuse material and moral damages (paragraph VI);
- b) access to the jurisdictional and administrative bodies regarding the prevention or redress for individual, collective or diffuse material or moral damages, being ensured legal, administrative and technical protection to the low-income consumer (paragraph VII); and
- c) easy defense of the consumer's rights, inclusive with the reversal of the burden of proof in his favor in the civil proceedings when, at the judge's understanding, the allegation is probable or they are at a disadvantage according to the ordinary rules of experience (paragraph VIII).

With the inclusion of these rights in the Consumer Protection Code, Brazilian legislators intended to ensure the most comprehensive protection to the consumer,

guaranteeing access to the Judiciary, in the case of offense against their rights, to require indemnity for the delict, be it patrimonial or moral.

Besides the rights mentioned above, according to article 20 of the Consumer Protection Code, the supplier of services shall be liable for quality defects that make them unfit for consumption or diminish their value as well as for those resulting from any discrepancy with the information shown on the offer or advertising message.

The services that show to be unfit for the purposes reasonably expected from them, as well as those that do not comply with the rules governing the rendering of services, shall be understood as improper (article 20, paragraph 2nd).

We can see that even if the provider ignores the problem with quality for service inadequacy they are still liable (article 23). Moreover, the legal warranty to the adequacy of a service is independent of any express statement, that is, it does not depend on its forecast in the contract, and the supplier's exoneration by contract of damages caused to the consumer, in other words, for their action or omission, is banned (article 24).

Article 25 of the code establishes the mutual liability of service providers who disrespect these basic rights:

Article 25: It shall be banned the establishment of any contractual clause that makes it impossible, or exempts or diminishes the obligation of indemnity provided for in this and in the foregoing articles.

**Paragraph 1: In the case that there is more than one party responsible for causing the damage, all participants shall be jointly liable for the redress established in this and foregoing articles** (Our emphasis).

According to what was explained before, based on this legislation, the civil responsibility generated by the redress of the damage is strict, because the service provider is liable regardless of guilt, being enough the existence of connection between action or negligence and the damage.

The damage can result from defects related to the rendering of services as well as for incomplete or improper

Article 14: The supplier of services is responsible, regardless of culpability, for the redress of damages caused to consumers for defects related to the rendering of services as well as for incomplete or improper information about their use and risks.

On the other hand, the personal responsibility of independent professionals shall be determined upon verification of the fault (article 14, paragraph 4th). This means that, if the service provider is a natural person, the claimant can only require indemnity proving the wrong action or negligence, proving that these were the case of damage and that the service provider acted wrongly, be it for negligence, recklessness or inexperience. Recklessness here means a premature action and without precaution. When acting, the person does the opposite of what is expected. Inexperience occurs when inaptitude, ignorance, lack of technical, theoretical or practical qualification, or the lack of the basic professional knowledge are determined. Negligence comprises neglect, carelessness, lack of attention, disregard,

indolence, omission or failure in fulfilling someone's duty when performing a particular procedure, taking the necessary precautions.

A service is to be considered defective when it does not offer the safety which consumers should expect from it, being considered the relevant circumstances such as the manner it has been rendered, the result and risks that can reasonably be expected from it and the time it has been rendered (article 14, paragraph 1th).

The service provider's and supplier's responsibility can only be excluded when they prove that there was no defect when the service was rendered, or that the consumer or a third party is responsible for the damage.

### **3 Hotel Responsibility in Relation to the Health Services Offered to the Guest**

The Consumer Protection Code also regulates the responsibilities of the several service providers, in the complex consumption relationship established between the hotel and the service providers hired to service the tourist consumers, notably the specific medical care services that the hotel offers their guests.

To start with, it is important to say that legislation and judge-made law related to this specific service are rare, probably because this is an area in development. However, it is understood that the logic applied to other services offered to the guests by the hotels is also applied to the case analyzed here since the Brazilian Consumer Protection Code does not establish a list of the services it covers, which allows the possibility of liability based on its rules to any case where the customer is a victim.

José Geraldo Brito Filomeno clarifies that, because of the strict liability concerning services there is the right for indemnity: "Launching a product or a service into the market alone is enough to give the right to the consumer to act legally against anyone making part of the liability chain responsible for this product of service" (Filomeno, 2001, pp. 141–142).

Thus, the hotel is jointly liable for intermediating medical care to its guests when it does not honor the contract, be it for not making the service available, or for its faulty rendering, or when the hotel cannot render the consumer the satisfaction they wanted to experience during their stay, frustrating their expectations in relation to the service acquired with the only purpose of having a safe stay in the hotel because of the medical care it offered.

In this way, when the contractual object is defective because of the lack or bad quality of the service hired, the hotel should indemnify the consumer and, since it represents a strict liability, the responsibility for the damage caused is present regardless the hotel's or its service provider partner's guilty action, as per articles 14 and 25 of the Consumer Protection Code.

According to our view, when the hotel takes the responsibility for rendering the service and this does not exist, the hotel is also responsible for the negligence in not

rendering the service or for the service specifications advertised in any media aimed to attract customers.

In like manner, when the service is faulty, the hotel also takes the responsibility for the good rendering of a service which did not fulfill the advertised specifications.

As an example we have the process no 2012.01.1.196363-8, where the Seventh Special Civil Court in Brasília<sup>2</sup> sentenced a hotel to pay R\$6000.00 as a redress for moral damage and R\$710.00 for material damage to a disabled guest, who fell down in its premises. The sentence was based on problems with the service rendering and abusive advertising because at its website the hotel informs that it can take care of disabled guests, offering them a ward with wheelchairs, 24-h security, lifeguards and medical care provided by a skilled nurse duly registered with the competent authority. However, the guest was helped by another guest who is a physician, not by the service offered by the hotel. In this occasion it was proved that the hotel did not have any kind of medical assistance, or safe ways of removing the guest. During the hearing, the hotel confessed it had two wheelchairs, both out-of-order, only one stretcher without side protection and that it had no physician. In face of the circumstances, the Judge decided that:

[...] the facts prove that there is no such medical service advertised at the defendant's website, which took the plaintiff to wrongly believe she had chosen an enterprise which would offer her husband, with a chronic and incurable disease, and herself, the necessary safety for a calm stay. In fact, the hotel does not have the necessary structure to suitably service any guest who needs immediate medical care because it does not have trained staff and the necessary material to effectively give first aid, what would be imperative since this service appears at the website and because the nearer city is 15 km distant from the hotel. As abusive advertising (paragraph 1st of article 37 of CDC) and the faulty service rendering (article 20 of CDC) were proved to exist, the defendant is considered responsible for indemnifying the plaintiff for the damages resulted therefrom.

It is important to register, however, that the hotel will not be held responsible in the case it is able to prove that, having rendered the service it had no defect, or the fault is exclusive on the consumer or a third party. A damage caused by a medical decision, exclusively connected to the professional activity, is an example of situation when the hotel is not considered guilty.

Likewise, the hotel is not legally liable when the contract does not provide the rendering of medical services, which simply represent a support activity whose offer only results from the enterprise's duty in relation to the tourist consumer. In this same line we have the decision of the Court of Justice of Rio Grande do Sul state which, even if the case is not exactly the same as the one under study here, shows the Judiciary understanding on the subject:

CIVIL RESPONSIBILITY. TOURIST PACKAGE. TOOTHACHE. CUSTOMER SERVICE. SERVICE WITH NO DEFECT. The civil responsibility of the travel agencies is

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<sup>2</sup>Source: News disclosed by the TJDF. Available at: <<http://www.tjdft.jus.br/institucional/imprensa/noticias/2013/agosto/hotel-e-condenado-por-ma-prestacao-de-socorro-a-hospede-que-sofreu-queda>> Access on: March 1, 2015.

legal and strict, both under the civil law and the CDC, applicable to this case. **The agency shall not be held responsible if it is able to prove that it rendered the service according to what was agreed.** The customer, suffering from a toothache, was treated by two dentists and one physician at the hotel where she was lodged, and they concluded that the problem was possibly a wisdom tooth erupting, diagnosis confirmed when the customer returned from the trip. This proves **the travel agency's compliance with its contractual obligations, of assistance to the travelers, but which do not include health care services, which, in addition, represent a support activity.** The conservative treatment was also adequate in this case. **The agency was not responsible for the decisions taken by the medical professionals; the service was not defective.** Right to appeal. (Civil Appeal No 70003265675, Ninth Civil Chamber, Court of Justice of Rio Grande do Sul, Rapporteur: Rejane Maria Dias de Castro Bins, Sentenced on 12/05/2001) (Our emphasis).

Indemnity, according to article 6, paragraph VI of the Consumer Protection Code, occurs when there is material damage (patrimonial), to be redressed according to the amount presented, or moral damage (extra-patrimonial), which is presumed and impacts the core, moral and subjective sphere of the one who suffered from it. Maria Celina Bodin de Moraes clarifies that, when illicit acts go against the rights of personality, here included life/physical integrity, honor, image, name and intimacy, the violation itself causes moral damages *in re ipsa* (presumed damage) resulting from a *praesumptio hominis* (Moraes, 2003, pp. 157–159). In other words, the duty of indemnity for moral damages results solely from the infringement to law. In this way, Carlos Alberto Bittar says:

[...] to start with, in the modern theory of redress of moral damages prevails the idea that the agent's responsibility exists simply because of the violation act [...] damage exists in the own violation fact, which requires an answer represented by the redress. In this context it appears *ex facto* when it reaches the victim, resulting in the negative reactions already mentioned. In this sense we called it *damnum in re ipsa*. Here it means absolute presumption or *iure et de iure*, as legislation qualifies it. It exempts, thus, contrary proof. The understanding that there is no reason to present a proof of moral damage is the result of the approach established (Bittar, 1994, pp. 202–204).

Differently from the patrimonial damages, the extra-patrimonial do not have an objective rule for the definition of the redress *quantum*. The criteria of reasonability and proportionality should be taken into account. In this way, the Judiciary says:

The indemnity for moral damage should be fixed in reasonable terms. There is no justification for the redress to be turned into an wealth without a cause, with abuse and exaggerations. Arbitration should be moderate, proportionally to the degree of guilt and to the financial reality of the parties, and the judge should be guided by the criteria suggested by the legislation and by the judge-made law with reasonability, taking advantage of their experience and best judgement, paying attention to life's reality and to each case's peculiarities. Moreover, the redress should contribute to discourage the offender to repeat the act, inhibiting their illegal behavior (RSTJ 137/486 and STJ-RT 775/2011).

Thus, according to the judge sentence quoted above, we can see that the request for indemnity for moral damages should not reach high financial value, which might aim to make the plaintiff rich, instead of compensating for the damage suffered. However, the indemnity should be enough to compensate the victim for the psychic pain suffered and to avoid that the service provider continue rendering inadequate services which do not comply with what was established in contract.



It is important to highlight that the hotel is not obliged to offer specific medical care to its guests, even because the rendering of these services does not constitute the main object of its activities and, obviously, in face of the risks of redress that offering these services can generate, this is not an usual practice in the hospitality industry.

On the other hand, if the tourist enterprise offers these services somehow, even through the hiring of a third part company to provide medical care to its guests, this enterprise can be responsible, both for the non existence of the service and for its deficient execution. Nevertheless, the hotel cannot be considered liable in cases of a mistake that can be exclusively connected to the medical professional activity of physicians and nurses rendering such services.

## 4 Conclusions

Considering the regulatory, doctrinal and judge-made law context mentioned above, we can conclude that the hotel which offers own or third-party services of medical, ambulatory and emergency care with ambulances which take the patient to hospital responds for the damages caused to the tourist consumer, both by not rendering it, that is, when the hotel calls the service provider but they do not show up, and by the bad quality of the services.

In both cases the hotel should be liable to redress the tourist consumer because of its mutual liability with the partners hired to offer such services.

The civil responsibility generated by the redress of the damage is strict, that is, the hotel is liable regardless the service provider being guilty or not, being enough the existence of connection between its or the provider's action or negligence and the damage caused to the consumer. In this case, the damage can happen because of defects related to the rendering of services as well as for incomplete or improper information about their use and risks. according to the article 14 of the Brazilian Consumer Protection Code.

The hotel will not be held responsible when, having rendered the service it had no defect, or the fault is exclusive on the consumer or a third party, when there are mistakes resulting from the medical professional activity, for example.

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# Domestic Medical Tourism: A New Look on Patients of the Public Health System and Their Companions

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and Eurico de Oliveira Santos

**Abstract** Traveling motivated by health problems is an old practice. Nevertheless, the definitions of medical tourism and medical tourist are yet quite diverse. This market sector involves thousands of people and dollars all over the world. But there are also those patients who travel in their own country or region financially supported by the public health system who should be taken into consideration. To study this sector, we have analyzed the number of patients in “in a” public hospital in Porto Alegre-RS-Brazil in 2014. From a total of 32,056 admissions, 28,478 were admitted through the public health system. We have considered that each patient was accompanied by a relative and, for this reason, we would have an equal number of people using the tourism resources near the hospital. These can have a significant economic impact on all the services available. We propose that the patients who travel in their own country or region should be called traveling patients. We also propose that the definition of domestic medical tourism should not include the way the treatment is paid, since the public health system patients and their companions can also generate income.

**Keywords** Tourism • Health • Treatment • Traveling • Domestic

## 1 Introduction

Traveling motivated by health problems is an old practice whose history is mingled to the own history of traveling and tourism. As may be seen below, besides the changing of destinies and therapies, the reason remains the same, the search for a treatment, wellness and the preservation of health. Today, like all results of the

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global era, tourism has acquired proportions which were new till recently; it breaks boundaries, creates new necessities and markets and enlarges or changes the ones already existent. This takes us to wonder about the existing concepts for tourism, tourist, traveling and medical tourism. We also question how to call this kind of traveler—medical tourist or medical traveler?

## 2 Literature Review

In order to answer to all these questions, it is necessary to revisit history and what is known about medical tourism and tourists. The earliest form of medical tourism—visiting mineral or hot springs—dates back to the Neolithic and Bronze ages in Europe (Ross, 2001). The medical tourism is an activity known in the Indian, Greek and Roman history, when it was basically linked, as the periods mentioned at first, to baths and the climate of certain regions and cities (Almeida & Ribeiro, 2014). Health-related traveling has happened worldwide since then, involving health maintenance and illnesses cure. Brazil developed its medical tourist potential in the XIX century, when the Portuguese Court came to the country. During this period, there was a big urban development, more specifically in Rio de Janeiro city. The city of Petropolis, in the mountainous region of Rio de Janeiro state, was the first Brazilian climate health resort, chosen by the royalty to avoid the heat in Rio de Janeiro city (Ribeiro, 2001).

And what is tourism? You can see below that such apparently simple question does not have a single answer. In fact, defining tourism is a tough task, since it can have many approaches; there are several ways of looking at the same phenomenon. Let's start with the World Tourism Organization (WTO) definition: Tourism is a social, cultural and economic phenomenon related to the movement of people to places outside their usual place of residence, pleasure being the usual motivation. Tourism means people movement, that is, to travel from their places of living to other places. Mario Beni, an important Brazilian tourism theorist, defines it as an intricate and complex decision-making process on what to visit, where, how and to what cost. Numberless factors, such as personal and social fulfillment of motivational, economic, cultural, ecological and scientific nature are involved in this process, which determine the choice of destination, the stay, the means of transportation and lodging, as well as the objective of the trip itself aiming the enjoyment—be it material or subjective—of the content of dreams, wishes, projective imagination, existential historic-humanistic and professional enrichment, and business expansion. This consumption is done through spontaneous or guided interactive itineraries, comprising the purchasing of goods and services, and the original and differential offer of attractions and tourism resources added to them with quality and competitive products in global markets (Beni, 1998).

To Beltrão (2001), in the past the tourist activity could have another objective and, consequently, a more restricted vision. In his own words, according to some

specialists, the definition of tourism is dynamic and changes according to the social, cultural and economic behavior of mankind.

Ansarah (2001) says that the tourist activity can be considered as a “sector grouping”, with a technical complexity existing among them, considering its heterogeneity and complexity, and states that tourism, as an economic sector, is a difficult concept to define in a uniform way. The author also agrees with other authors that the tourist activity is getting to a certain point of “maturation”.

Tourism, according to De La Torre (1995), is a social phenomenon comprising the voluntary and temporary movement of individuals and groups of people who, basically for reasons such as recreation, relaxation, culture or health, go from their usual place of living to another, where they do not have any profitable or paid activity, generating several interrelations of social, economic and cultural importance.

According to Beni (1998), the definitions of tourism have a particular characteristic, since they were more motivated by considerations of demand than of supply. Smith, in Beni (1998), says that defining tourism in terms of the travelers’ motivation or characteristics would be the same as trying to define the health care professionals through the description of a sick person.

After presenting different definitions of tourism, let’s define traveling. The definition of traveling—according to the Portuguese Online Dictionary (Dicionário Online de Português)—is the action of moving from one place to another, generally covering a long distance, which also refers to when a person stays for some time in their place of destination for work or tourism. Beni (1998) refers to traveling or moving as being an implicit element of the notion of tourism. He considers this movement as closely connected to the very etymological sense of the word “tour”: traveling in a circuit; movement forth and back. The author also highlights that without movement there is no Tourism.

After defining tourism and traveling, let’s focus on the main character in such activities, the tourist. The World Tourism Organization defines it as a temporary visitor, coming from another country, and that stays in the country for any reason besides working more than 24 h and less than 3 months. According to Beni (1998), the tourist is the temporary visitor who stays at least 24 h in the country they are visiting, and whose trip has one of the following purposes: leisure (recreation, vacation, health, study, religion and sports), business, family, missions or conferences. He also mentions the term “excursion traveler”, who is the temporary visitor staying less than 24 h in the visited country (including cruising travelers). Cooper, Feltcher, Wanhill, Gilbert, and Shepherd (2001) say that tourists are, in reality, a heterogeneous group, with different personalities, demographics and experiences. The authors classify the tourists according to the nature of their trips.

So we can say that tourism is a complex process, which suffers the influence of different factors, with different motivations and objectives, and which involves the action of movement. To fulfill these different motivations, it is necessary to split tourism into different areas of interest, that is, the tourism segmentation.

For Brazil’s National Secretariat of Tourism Policies (Brasil. Ministério do Turismo, 2010a), this segmentation is understood as a way of organizing tourism

aiming planning, management and market. The tourism segments can be established from the elements of offer identity and from the variable characteristics of the demand. A segment, from the demand point of view, is a group of present and potential customers who share the same characteristics, needs, purchasing behavior or consumption patterns. The professionals who work in this industry, or in any other economic activity, do not build up segments, they only identify and decide to which segments direct the efforts of creation and offer of their products. This understanding of the preferential segments enables a better organization of the efforts for attraction and loyalty of tourists. Kotler, Keller apud MTUR (Brasil. Ministério do Turismo, 2010c) say that once the demand segment is identified, the planner of the tourist strategy or the enterpriser should present flexible products offers, since not all customers have exactly the same demands and preferences.

The main differences among the many types of tourism lie on the reasons why people travel (Pold). One of the segments to be defined and object of our study is the medical tourism. In this case, the main purpose of the trip is related to the health maintenance or recovery.

Medical tourism can be treated as an umbrella term, including the health tourism, the spa tourism and the wellness tourism (Pold). The focus of the present work is the medical tourism and the people who travel in these circumstances. Our scope are the people and their companions who travel in their own region or country because of health issues. If the definition of the segment “medical tourism” is not clear, doubts arise concerning the planning and the way of organizing the resources. There is not a unique definition of medical tourism. Below we quote some of them:

- According to Kelley (2013) in his presentation “Medical Tourism” for the WHO (World Health Organization) Patient Safety Programme, no agreed definition of medical tourism exists. He also says that medical tourists elect to travel across international borders to receive some medical treatment.
- The Medical Tourism Association defines medical tourism as when people who live in one country travel to another country to receive medical, dental and surgical care while at the same time receiving equal or greater care than they would have in their own country, and are traveling for medical care because of affordability, better access to care or higher level of quality care.
- Carrera and Bridges (2006) define health tourism as the organized travel outside one’s local environment for the maintenance, enhancement or restoration of an individual’s wellbeing in mind and body. A subset of this is medical tourism, which is the organized travel outside one’s natural healthcare jurisdiction for the enhancement or restoration of the individual’s health through medical intervention.
- According to Ramirez de Arellano (2007), medical tourism involves patients intentionally going abroad to pursue medical services outside of formal cross-border care arrangements that are typically paid out-of-pocket.
- Brazil’s Ministry of Tourism, in its brochure about this segment, defines medical tourism in the following way: it comprises the activities derived from the use of means and services with medical, therapeutic and esthetics purposes (Brasil.

Ministério do Turismo, 2010b). It organizes the segment in two types of medical tourism: wellness tourism and medical-hospital tourism.

- To Jose and Sachdeva (2010) medical tourism involves traveling to an advanced facility in another country for receiving requisite medical/surgical treatment at a much lower cost that is often linked with using the savings to opt for and enjoy a holiday during recovery. It is also said that it is largely true for ambulatory/elective interventions.
- To Al-Hinai, Al-Busaidi, and Al-Busaidi (2011) medical tourism is a new term used to describe the practice of seeking medical care abroad for non-emergency conditions.
- Hanefeld, Horsfall, Lunt, and Smith (2013) define it as the phenomenon of people traveling abroad to access medical treatment.
- Ormond, Mun, and Khoon (2014), quoting other authors, define the segment as “all the activities related to travel and hosting a tourist who stays at least one night at the destination region, for the purpose of maintaining, improving or restoring health through medical intervention.”
- Kovacs, Szocska, and Knai (2014) highlight that medical tourism refers to treatments or surgeries planned in advance, which take place outside a patient’s usual place of residence. According to this concept, only those traveling for elective procedures can be considered.
- Meštrović (2014) defines it as the process of traveling outside the country of residence for the purpose of receiving medical care.

If there is not an agreement concerning the definition of medical tourism, WHO also calls the attention to the way these tourists are registered, which can also vary. Some countries count the foreign patients’ hospital appointments, while others count the individual entrance of patients in the country. Others check their nationality, but not the country of residence (which can be a problem when immigrants go back to their origin country seeking for medical care).

Another concept, by Hohm and Snyder (2015) also includes the way the treatment trip is paid. In this way, the Medical Tourism is an international trip aiming medical treatment that is paid out of pocket, and beyond the scope of government-administered, cross-border care arrangements.

The concepts vary a lot, with some of them considering only the international trips in their definition. When we look towards those who travel inside their own region or country, we have the concept of “Domestic Medical Tourism”. At the Medical Tourism Association website we find a definition for this segment of medical tourism. It is said that “Domestic Medical Tourism” is when people who live in one country travel to another city, region or state to receive medical, dental or surgical care while at the same time receiving equal or greater care than they would have in their own home city, and are traveling for medical care because of affordability, better access to care or a higher level of quality of care (Medical Tourism Association, 2015). At the Health Care Boundaries’ website, the definition to Domestic Medical Tourism is the practice of traveling from one city to another or from one state to another within one’s country for medical care that is either not

available in one's own neighborhood or is less expensively available in another neighborhood (Health Care Boundaries).

The daily practice in public and reference hospitals allows us to observe that there is a great deal of patients coming from cities in the same state of the hospital of destination as well as from other regions inside their own country. In general, these patients come with, at least, one relative who stays near them during their hospitalization period. If this period gets longer, there can be relatives taking turns to be with the patient. In this way, we have a great deal of patients and their relatives who do not leave the limits of their region or country, but who travel because of health reasons. Usually the patient's transportation is made on the expenses of the public health system, and the patient does not have any cost regarding their transportation or treatment. Even if the patient does not use tourist products and services, their relatives do. Their relatives can travel on their own expenses. Apparently, these "tourism consumers" are ignored when it comes to studying the matter, since studies only focus the patient and their expenses with treatment and lodging.

For this reason, our objective with this work is to question the concept of domestic medical tourism limited to those patients who pay for their trip and to launch the basis for larger studies on the impact of the patient and their relatives in their own tourist market, and what they can represent for the tourist services.

For the initial evaluation of these potential health tourists and their companions, we decided to study the sample of patients admitted in a big public hospital in Porto Alegre city, the capital of Rio Grande do Sul state, with a population estimated in 1,472,482 inhabitants, as reported by the Brazilian Institute of Geography and Statistics. According to this institute (IBGE, 2009), the city has 9 federal public, 4 state public, 115 municipal public and 502 private health institutions. The hospital chosen was Hospital de Clínicas de Porto Alegre (HCPA), of Federal University of Rio Grande do Sul (UFRGS), a federal public hospital linked to Brazil's Ministry of Health. The hospital has an installed/operational capacity of 845 beds. It is the only university hospital in the country certified by the Joint Commission International. Patients are admitted at the hospital through spontaneous demand (seeking emergency care) or directed by the state or city Health Secretariat. The hospital also services private patients and patients with private health care plans, but these represent the smallest group. These patients are admitted to the hospital through their private doctors who work there.

The objectives of this article are: questioning the concept of domestic medical tourism limited to those patients who pay for their treatments; performing an initial gathering of the number of patients in the Single Health System admitted to a hospital in Porto Alegre city and of the lodging available near the hospital.



### 3 Methodology

To carry out the present work, articles presenting definitions of medical tourism were reviewed using the active search of the terms *tourism*, *tourists*, *health*, *medical*, *definition*, *domestic*.

Data concerning the entrance of tourists in Brazil because of health issues was collected at the official website of Brazil's Ministry of Tourism.

The total number of admittances in HCPA-UFRGS in 2014 was analyzed, with the patients being divided in "from Porto Alegre" and "from outside Porto Alegre". To calculate the number of relatives we used the number of patients admitted through the Single Health System (SUS), Brazilian public health system. Only the average period of hospitalization concerning Clinical Medicine was used. Data was obtained at the institution official website and through authorized research. For calculation, we considered that each patient from outside Porto Alegre was accompanied by a relative.

The search/reservation website Booking.com was used to search for the number and price of places offering lodging available near the hospital.

HCPA-UFRGS disclosure of data was done under previous authorization.

### 4 Results

As it has been said, there is no consensus around the concept of medical tourism. Definitions found in articles, texts and presentations from different sources and publishing years were listed in this work.

The number of hospital admittances in HCPA-UFRGS in 2014 was 32,056, with 28,478 through the Single Health System. From the total of admittances, 16,109, 50.25 % were of patients coming from outside Porto Alegre. When only SUS patients were considered, 14,037, 49.29 % represented patients coming from outside Porto Alegre. The average period of hospitalization for Clinical Medicine was 8.84 days, without considering the origin and way the patient was admitted; being considered only the SUS patients. For calculation, as it has been said, it was stipulated that each SUS patient would have the company of a relative. Thus, we would have a total of 14,037 companions/year for patients from outside Porto Alegre, and these would stay 8.84 days in town.

From a walking distance from Hospital de Clínicas there are two hostels, one apart hotel and one apartment to rent. The daily rate in hostels is R\$35.00 or U\$11.25 dollars (exchange rate on March 10th, 2015: R\$3.11).

Those patients from outside Porto Alegre who only come to town for appointments and small medical procedures do not fit into the definition of tourists, and were not considered in the calculation. In the same way, private patients or those with private health care plans and their companions were not considered since they are not part of these study.

## 5 Discussion

The history of humanity is made of travels and movements. Many were the reasons which took people to travel; health was just one of them. As time passed, some of these motivations might have changed, but man keeps traveling for health, medical treatment and wellness (Almeida & Ribeiro, 2014). All over the world, the market of medical tourism grossed around US\$60 billion per year (Han, 2013). Studies on the subject include here the tourists who travel beyond the frontiers of their countries seeking medical care. The daily observation of the flow of people in public hospitals in Brazil made us question the different concepts of domestic medical tourism, which limit the concept to trips paid by the people who need medical care. SUS patients also travel for treatment and, in a general way, their transportation is paid by the system. Considering the definition quoted by Ormond et al., 2014, we see that these patients fit the definition of tourists because they stay more than one night in town (for an average period of hospitalization of 8.84 days) and with the purpose of keeping, enhancing and restoring health through medical intervention. They also fit into the Ministry of Health definition because they use means and services with medical, therapeutic and esthetics purposes (the last one being an exception). In this way, those patients who travel in their own country or region, with costs paid by the public health system, could also be called medical tourists according to the concepts considered.

While the patient stays in hospital, their relatives can use tourism resources such as hotels, hostels, restaurants, etc. For this work, the relatives represented an estimated amount of 14,037 people. If we consider that, in 2008, the total entrance of tourists in Brazil motivated by health, according to Ministry of Tourism data (2010), was 31,482 people, we can assume that the flow generated by SUS patients' relatives in one single public hospital in Brazil represents 44.59 % of the total volume of medical tourists in the whole country. The companions are "customers of tourist services" during about 9 days per each admittance. Adding the SUS patients and their companions seeking medical care in only one hospital in Porto Alegre, there are 28,074 people, or 89.17 % of the total of medical tourists coming to Brazil in 2008. Analyzing the period of hospitalization, we have to bear in mind that this is a tertiary hospital, that is, it deals with cases of high complexity, which can make the stay last longer than in other hospitals. Since we are talking about a public hospital, we have to consider that the total spent with these companions is not the same as what is spent by international medical tourists. In 2011, it was estimated that international medical tourists spent around R\$480.00 (without considering medical expenses) (UOL Viagem, 2011), or US\$154.34 per day. This represents 60.91 % of the national minimum wage in 2015, whose value is R\$788.00 or US\$253.38 (dollar quotation: R\$3.11 in 03/10/2015). The companions of the domestic medical tourists, who depend upon the public system for their treatment, are not spending this much or an amount near to it. This does not mean that they should be ignored. They can spend more modest amounts, but, even so, they are having costs; they are costumers who can generate income to businesses near the hospital. The two

hostels have low rates, and, being close to the hospital, do not involve the use of transport (be it public or private), reducing the cost of lodging. Some relatives, after being interviewed by the hospital social work, receive food for free. For the others, there is a variety of restaurants and coffee shops nearby who also service the patients and their relatives who get to the hospital for appointments and little procedures. Ignoring these people means ignoring business opportunities. Studying this market implies a very comprehensive research to determine the companions' daily expenses, their consumption in the region and what they represent for the turnover of the businesses near the hospital, as well as the needs related to lodging and their characteristics. As mentioned in the introduction, the tourism segments are not created, rather identified. And we have identified a segment which deserves attention because it can generate the necessity for specific products, such as lodging and food at low price and in the hospital's area. Thinking about this segment means putting into action strong points of a good tourism professional, that is, planning and effort organization.

Some of the patients might have to stay in town for appointments after they are discharged, which implies the need for lodging and the use of tourism resources. The number of patients in this situation needs to be determined.

Another interesting fact is that the hospital under study is expanding its constructed area in 70 %, which should be finished in November, 2017. This means a bigger flow of patients and their companions, and a larger necessity of services to fulfill the demand of this segment.

For this work we chose a hospital which, as many private hospitals, was granted the Joint Commission International's certificate of international accreditation. This allows us to say that the domestic medical tourist is having an international pattern treatment, which guarantees the same quality the tourist (national or international) who pays for their own medical expenses have. What we want to show here is that we can exclude from the concept of domestic medical tourist the way the medical expenses are paid, since quality is the pattern. The fact that this is the only hospital in the JCI Academic Medical Center Hospital Program in Brazil to hold this certificate (2015) does not limit the concept, because other public hospitals can also be awarded this certificate. We believe that the new concept we are proposing with this study should be broad, including patient tourists using the public health system.

In this way, we believe that the definition of domestic medical tourist should avoid the issue of payment; it should only involve motivation, traveling and period of stay. We also believe that this definition should not be too complex or strict since we are dealing with a subject under constant change, that is, dynamic as the own nature of the tourist activity. In this way, for future studies, we are considering domestic medical tourism as referring to patients traveling in their own region or country, seeking treatment, aiming to maintain or restore health, and who stay in the place of destination for a time longer than 24 h, without considering the way expenses are paid. Like the concept of tourism, this new concept shows and confirms the length of the activity, the way it modifies itself while new situations appear. We confirm what most of the authors in this industry say when they try to

define tourism. Here we follow the model of definition by demand, not by offer, as quoted previously when we listed the different definitions of tourism.

It has also been questioned who go on a medical tour, if tourist or patient (Brasil. Ministério do Turismo, 2010b). It has been said it is a question of point of view, the physician's or the tourism professional's. For planning everything involving the sector, the definitions are, as discussed above, extremely important. Thus, like the concept of medical tourism, we need to establish a definition. We chose the expression "traveling patient" because we believe it summarizes the main agent in this segment, the patient who travels seeking medical treatment.

## **6 Implementation**

This work brings the first collected data concerning the patients treated in public hospitals, the potential number of companions, and the available lodging near the hospital under scope. A more comprehensive study is already being prepared to evaluate the exact number of companions and the availability of the different lodging businesses near the hospital.

## **7 Limitations**

The present study is the beginning of a bigger work. Here we analyzed retrospective data and the tourism related bibliography, which are the reference for the work to be executed after that.

## **8 Conclusions**

The domestic medical tourism represents a volume of tourists and their companions which can have a significant impact for the tourism resources, mainly for those located near public hospitals. The definition of domestic medical tourism to be used by the authors from this study on is: domestic medical tourism refers to patients traveling in their own region or country, seeking treatment, aiming to maintain or restore health, and who stay in the place of destination for a time higher than 24 h, without considering the way expenses are paid. SUS patients do not use tourism resources, but their companions do, and they represent a significant number of potential users. More study is necessary to determine their profile and necessities. Moreover, the term "traveling patient" should be used to refer to those patients who seek medical care out of their place of residence.

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# Festivals for Local Products in Southern Bulgaria: The Perspective of Organizers

Ilinka Terziyska

**Abstract** In recent years festivals are experiencing a boom and are seen as a tool for tourism development, which has the potential to enhance community integrity and promote local culture. The study investigates the festivals based on local products in the southern part of Bulgaria. As its main goal is to identify current problems and trends in this sphere, it has adopted an organizers-driven perspective, focusing on several main points: organizers' expected and perceived benefits from holding the event, structure of festivals in terms of participants and visitors, issues related to funding and advertising, event organization and authenticity of presented products. The main problem areas that were identified include insufficient public-private partnerships, relatively poor results achieved in terms of attracting tourists and promoting local business, difficulties in funding and advertising and low level of authenticity.

**Keywords** Festivals • Local products • Traditions • Organizers

## 1 Introduction

Festivals are a millennia-old phenomenon; yet, their character has been changing through the years. In ancient times, through the Middle Ages and till Modernity most festivals were based on cults and religion, or the agrarian cycle (harvest festivals), even the etymology of the word can be traced back to the Medieval Latin *festivus*, meaning “of a church holiday” (Harper, n.d.). In modern times, festivals are more associated with leisure time and even if they are based on a traditional ritual, the focus shifts towards entertainment. There are numerous definitions in academic literature. Janiskee states that festivals can be perceived as “formal periods or programs of pleasurable activities, entertainment or events having a festive character and publicly celebrating some concept, happening or fact” (Janiskee, 1980). Another frequently cited definition is the one of Fallasi, who describes festivals as:

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*a periodically recurrent, social occasion in which, through a multiplicity of forms and a series of coordinated events, participate directly or indirectly and to various degrees, all members of a whole community, united by ethnic, linguistic, religious, historical bonds, and sharing a worldview. Both the social function and the symbolic meaning of the festival are closely related to a series of overt values that the community recognizes as essential to its ideology and worldview, to its social identity, its historical continuity, and to its physical survival, which is ultimately what festival celebrates (Falassi, 1987)*

Summarizing the above mentioned and some other definitions, the following characteristic features of festivals can be drawn:

1. Festivals are social events.
2. Local people are (though to various degrees) involved.
3. They are recurrent events.
4. Festivals are limited in time and space.
5. Festivals are rooted in the host community social and cultural life.
6. Festivals have a symbolic meaning related to the host community.
7. Entertainment is one of the prevailing elements.

It should be however noted that in contemporary practice some of these often sound more like recommendations rather than characteristic features. There are examples of festivals held with the main reason of attracting tourists, in which the host community is almost completely ignored (i.e. the Apollonia Festival of Arts in Sozopol, Bulgaria, where the first participant from the host town was registered only a few years ago, or the Jazz Festival in Bansko).

Festivals can take different forms; the most usual classifications are based on scope and theme. McDonnell, Allen, and O'Toole (1999) distinguish four types of event according to their size: local community-based events, major events (e.g. national folk festivals), hallmark events and mega-events. In terms of theme the diversity is greater: arts festivals, harvest festivals, food festivals, music festivals, theatre festivals, storytelling festivals etc.

This paper examines festivals of traditional local products. Thus, it will exclude festivals based on modern art, theatre or music, and will instead focus on intangible heritage in all its manifestations: oral traditions and expressions, including language as a vehicle of the intangible cultural heritage; performing arts; social practices, rituals and festive events; knowledge and practices concerning nature and the universe; traditional craftsmanship and livelihood; and traditional food. In the marketing theory a product is "everything that can be offered to a market for attention, utilization, use or consumption and can satisfy a need or necessity" (Armstrong & Kotler, 2005, p. 223). Each of the elements of intangible heritage could become a product and therefore be marketed through a festival after undergoing various degrees of commoditization.



## 2 Literature Review

In recent years festivals are experiencing a boom and are seen as a tool for tourism development, which has the potential to enhance community integrity and promote local culture. Festivals and events are also seen as a constituent element of place-marketing strategies in the face of increasing competition among cities (Quinn, 2009, p. 486). To remain competitive, “cities are turning to strategies that focus on their own innate resources—their histories, spaces, creative energy and talents” (Richards & Palmer, 2010, p. 2). Thus, the number of events based on local products has seen a boom in recent years; yet, academic literature seems to be focused on large-scale festivals and sports events (Kostopoulou, Vagionis, & Kourkouridis, 2013).

Festivals research seems to be focused on several topics. Economic impact of events seems to be dominant, with abounding theoretical models and empirical studies (Crompron, Lee, & Shuster, 2001). There are also a number of studies that emphasize social influence of festivals, including building pride in the local community (Gibson & Davidson, 2004), strengthening group and place identity (Bres & Davis, 2001). One of the seminal works in this aspect is the one of Delamere, who identified two main groups of factors: social benefits and social costs, with the most influential benefits being enhanced image of community, community identity, uniqueness of local community and festivals as showcase of new ideas, and major costs: disruption of normal routines, intrusion into lives of residents, over crowdedness and overuse of recreational facilities (Delamere, 2001). In important focus on social impacts is community involvement. Anastasiadou and Rogers propose a framework consisting of three indicators to help event planners enhance involvement of local people: involvement of schools; volunteering opportunities; participation in decision making; accessibility; and business cooperation (Rogers & Anastasiadou, 2011).

The predominant part of literature is focused on the perceptions of visitors. A number of studies is dedicated to visitors’ motivation (Backman, Backman, & Uysal, 1995), segmentation of visitors ((Formica & Uysal, 1996), visitors’ satisfaction (Cole & Chancellor, 2009) etc. Leading motivations for visiting festivals as identified in numerous studies include: socialization, entertainment, cultural exploration, family togetherness, novelty/uniqueness, excitement, escape. A small part of these however investigate festivals of local/traditional products; a recent addition is a study on a Slow Food festival, which finds festival programme, amenities and entertainment to all have impact on visitor satisfaction, while revisit intentions are mostly influenced by food and amenities (Jung, Ineson, Kim, & Yap, 2015). While most studies are focused on on-site visitor experience, a few ones examine behaviour change and level of engagement. Recent research by Organ et al suggests that festivals and food festivals in particular may be used by authorities as a tool for implementing policies aimed at changing food choices. Engagement with food at the festival was found to be a strong predictor of subsequent purchases, which

provides an important value added aspect (Organ, Koenig-Lewis, Palmer, & Probert, 2015, p. 93).

The number of studies that focus on organizers perceptions is limited. The first to explore how special events impact the local community from the organizers' perspective were Kim and Uysal (2003). The findings reveal that perceived economic impacts had four main domains: Community Cohesiveness, Economic Benefits, Social Costs and Social Incentives. Their work was extended and validated by Gursoy, Kim, and Uysal (2004). Almost ten years later, Kostopoulou et al enhanced the research in this aspect by including other key stakeholder groups: in their study they assessed the perceptions of festival organizers, local authorities and tourism market in terms of the economic impact of regional cultural festivals on host communities (Kostopoulou et al., 2013). A recent study based on in-depth interviews with festival leaders has elicited four areas that most significantly relate to sustainability of festivals: the event subject focus, leadership, funding, and the organizational culture (Ensor, Robertson, & Ali-Knight, 2011).

### 3 Methodology

In order to study current problems in the festival industry an online survey among festivals and local events organizers in the administrative districts of Blagoevgrad, Smolyan, Haskovo and Kardzhali was conducted. The statistical population of respondents includes organizers of events for presenting local products in the regions of Blagoevgrad, Smolyan, Haskovo and Kardzhali of Bulgaria. The comprehensive list of respondents was drawn following an extensive on-line research resulting in a data-base of all festivals on local products held in the area, along with contact details of their organizers. The identification of festivals was performed by applying a three-step approach:

1. Initial data collection and elaboration of a full list of events for each of the surveyed area. At this stage the secondary data collection method was applied, using the official sites of local authorities, the official site of the Ministry of Culture of Bulgaria, and the Bulgarian specialized web site for cultural events (<http://www.sabori.bg/>).
2. Elaboration of a set of criteria for inclusion in the final list. The first condition for inclusion was "the central theme represents a local/traditional product". Local/traditional products were defined as both "specific to a given area" and "long-established" and could include folklore, traditional food/cuisine, traditional ritual/celebration, agricultural products, natural resources, cultural/historical heritage. The second condition was the scope—events which were limited only to the settlement they were held in were excluded, unless they had the potential to further develop and attract tourists (e.g. the event presents a rare/unique product, the town is a tourist destination, etc.).

3. Filtering the initial list by applying the above criteria. The final list consists of 107 festivals on local products: province of Blagoevgrad—44, province of Smolyan—20, province of Haskovo—30, province of Kardzhali—12.

The statistical population of the survey consists of 53 organizations and institutions that organize festivals for local products in the area. The number is almost half less than the number of identified festivals, because a lot of the organizations are responsible for holding more than one event. The questionnaires were sent to all units of the statistical population (53) in the period 12.01.2013–05.01.2013. Twenty-one completed valid questionnaires were received, forming a response rate of 39.6 %.

The festivals that are subject to the study were chosen on the basis of their theme and fall in the following groups:

1. *Folklore festivals*—one of the most common types, based on folk dance and music. To this group we can also add storytelling festivals. Some of the most popular storytelling festivals are The Scottish storytelling festival, the Welsh Festival “Beyond Boundaries,” the USA National Storytelling Festival of and many others. Although storytelling is not a very popular topic in Bulgaria, for several years now there has been a similar event in the country too—Skratska Academy (village of Skrat, Bulgaria).
2. *Festivals based on traditional rites/rituals*—the most popular festival in Bulgaria of this type is the Festival of the Masquerade Games in Pernik. Most festivals of this type are based on ancient traditions connected with the year cycle.
3. *Food/culinary festivals*—these are events that have food as their central theme. The most renowned ones on a world scale are: Napa Truffle Festival, Madrid Fusión, South Beach Wine & Food Festival, Melbourne Food & Wine Festival, etc. In the surveyed area, several such festivals were identified, including a joint event of the Belasitsa Nature Park Directorate and Slow Food Bulgaria.
4. *Festivals dedicated to local agricultural products*—“Festival of the Potato” (Ravnogor, Bulgaria), “Feast of beans” (Smilyan, Bulgaria) and others. Although the obvious topic in most of these is agriculture, the focus is often on traditional food (meals prepared from the product).
5. *Festivals of traditional crafts*. Events of this type are in two varieties—focus on crafts as a whole, or on a particular craft (wood-carving Festival in North Carolina).
6. *Festivals based on gifts of nature/natural resources*—these include herb festivals (Herbfest—Ottawa, Canada), festivals of wild plants (chestnut festival—village of Kolarovo, Bulgaria) and others.
7. *Festivals based on cultural/historical heritage (tangible and intangible)*. In the surveyed area these form the least numerous group.

The questionnaire contains 28 closed questions, which can be grouped in several modules: demographic profile of respondents, aspired benefits, profile of visitors and participants of festivals, funding, marketing and advertising, event duration and

feedback from visitors. An important focus is the perceived authenticity of product/tradition representation within the festival.

## 4 Results and Analysis

The first module of the questionnaire has a profiling character, and the obtained results are as follows:

### Demographic Profile

The predominant share of respondents is between 45 and 60 years old, which corresponds to the actual state in the sectors under review. 91 % of respondents are women, and 9 % are men, which again reflects the current ratio of employees in local authorities and cultural community centres. As far as educational level is concerned, 82 % hold a university degree, while 18 % have completed secondary education.

### Type of Organization

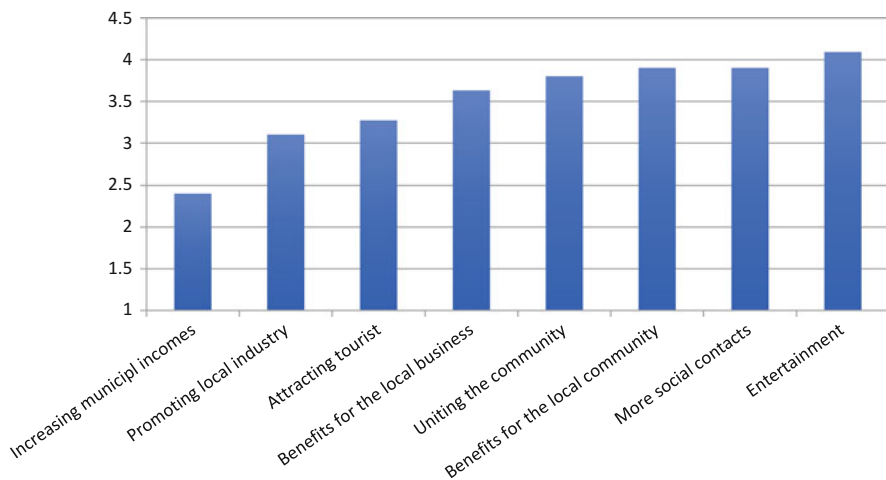
Respondents are employed in four types of organizations/institutions: local authorities, cultural institutions (community centres), NGOs and governmental institutions. Local authorities form the largest share of festival organizers in the region, accounting for 48 % of the total, followed by cultural institutions—38 %. By cultural institutions in this case we mean cultural community centres (*chitalishta* in Bulgarian), a type of institution which was established in the Bulgarian National Revival Period (eighteenth–nineteenth century) and whose main activity at present is associated with preserving local traditions. The share of NGOs is relatively small—only 10 % and governmental institutions account for only 5 %. This distribution of respondents reflects the actual situation identified through the exhaustive research conducted prior to the survey. The predominant share of respondents occupies expert positions (64 %), followed by “secretary” (27 %) and members of the management board (9 %).

One of the questions to which this study aims to answer concerns the reasons for organizing festivals on local products. The importance of predefined variables was assessed by using a 4-point Likert scale ranging from 1 (not important) to 4 (very important). Table 1 displays the findings by dividing the factors in three main groups where as very important were rated items that received a mean above 3.5, items rated between 2.5 and 3.5 fall in the second group (of average importance) and items with a mean lower than 2.5 are described as not important.

The reasons that play the least important role in organizing festivals on local products are the ones related to history and religion. In a second group of reasons that have relatively higher significance we can cite those related to making contacts (with advertisers and sponsors, as well as public opinion leaders), and economic factors. The most important role in motivation is played by promotion (of both place and product), attracting tourists, creating a brand, and last but not least—providing entertainment. These to some extent resonate with the social benefits

**Table 1** Reasons of holding a festival for local products/traditions as reported by organizers

Very important	Of average importance	Not important
To raise the prestige of the place	To inform the public	Religious reasons
To increase the popularity of a local product	Economic reasons	Historical reasons
Tourism growth	Contacts with leaders of public opinion	
To create a brand in the festival sphere	Contacts with sponsors, advertisers etc.	
Opportunities for entertainment		



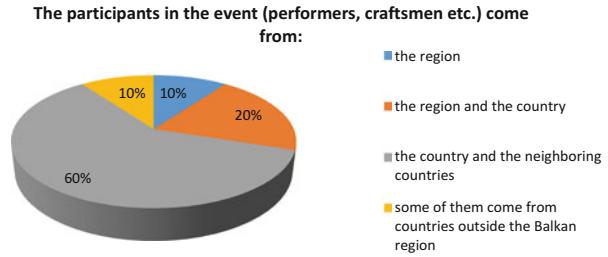
**Fig. 1** Assessment of perceived benefits

identified by Delamere (2001), coupled with an emphasis on economic benefits. The results once again show the major role that tourism plays in the organization of festivals and other special events. While only a few decades ago cultural institutions focused their attention on the preservation and promotion of local culture, today an important part of their motives is related to the increase of tourism flow in the destination.

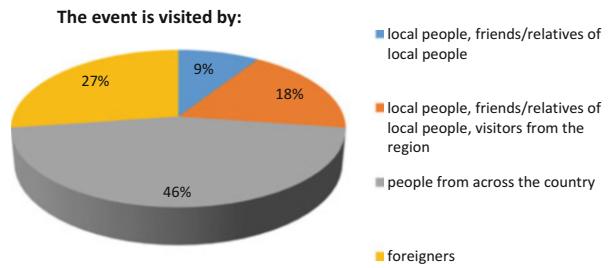
The above mentioned goals, however, are not always fully achieved (Fig. 1).

To assess perceived benefits, again a Likert scale ranging from “Poor” (1) to “Excellent” (5) was used. It was found out that organizers did not achieve their goal with respect to two of the main reasons for organizing festivals: attracting tourists and promoting local production—they were assessed below average. The lowest evaluated benefit was increase of municipal revenues, which is somewhat understandable, since they are not among the important reasons for holding a festival for local products. Benefits associated with local businesses and the local communities

**Fig. 2** Distribution of festivals according to origin of participants



**Fig. 3** Distribution of events according to type of visitors



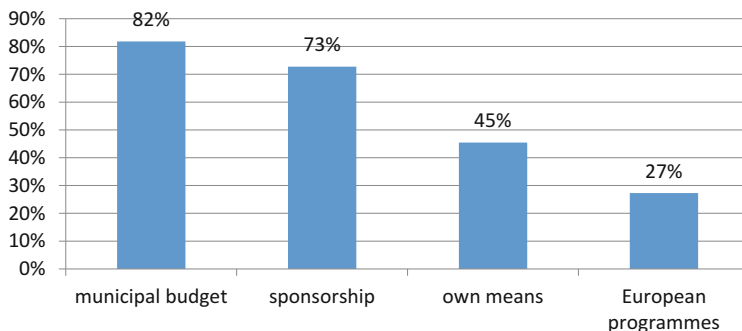
are higher than average, but still do not reach a very good assessment. The opportunities for entertainment and sharing experience and culture are the top ranking benefits according to organizers.

Three of the questions are devoted to determining the scope of the festival activities. The results suggest that 64 % of the respondents held between two and four events related to local culture per year and a significantly lower share (34 % of all respondents) provided more than four festivals whose subject focus in on local products or traditions per year.

The territorial scope of the attracted participants and visitors is depicted in Figs. 2 and 3.

The structure of participants is an important element in the event attractiveness. Moreover, attracting foreign participants is important for enriching cultural exchange, which was identified as one of the main reasons for organizing festivals. More than half of the organizers (60 %) manage to attract participants from both the country and from neighboring countries. 20 % of the surveyed events feature participants from the country, and a relatively small share of events are held only with participants from the region (10 %). However, the share of those that attract participants from outside the Balkan region is quite small—only 10 %.

Some differences are observed in the ratio between the types of visitors (Fig. 3). This type of structure is also connected to the objectives that drive organizers, but unlike participants, visitors are more related to tourism and image oriented goals. The proportion of visitors in the surveyed festivals from abroad is significantly smaller compared to foreign participants (27 % compared to 70 % of participants from outside the country). The main share of events (46 %) attract visitors from



**Fig. 4** Funding sources

across the country, 18 % are limited within the region, and 9 % are visited only by residents and their friends and relatives. This distribution is not unfavourable, given that most of the festivals are small community-based events.

A large percentage of organized events (36 %) have no permanent participants, 46 % have some, and 18 % say that almost all their participants are regular ones. The large proportion of organizers who fail to attract regular participation in the event could be explained by the fact that there are several festivals taking place only since a few years ago; it could, however, also be the result of inefficient management. The proportion of events that attract the same participants each year is also of concern as it indicates a lack of development.

Figure 4 shows the most common sources of funding. The largest share of funds comes from the municipal budget, sponsorships and donations, used by 82 % and 73 % of respondents respectively. Almost half of respondents rely on own revenues and less than a third—financing from European projects. Overall, the results indicate untapped potential for funding from national and European programs.

Event duration is important mainly because of economic (especially tourism-related reasons). Longer events provide higher hotel occupancy levels which is an opportunity to overcome (at least for that limited period of time) the weekend-only destination problem. Moreover, an event that is spanned over a longer period allows for a less hectic programme and hence reduces the risk of overcrowding. The present study reveals that the most preferred event duration is 2 days, followed by 3 days (30 %) and a negligible share of 10 % of respondents express preference for 1 and 4–7 days respectively. The identified refraining from longer events could be explained by the increased efforts in terms of organization and need for funding, which is often hard to achieve by smaller communities and organizations. There are however some exception to this trend, one of the best examples being the [Terlik Festival \(n.d.\)](#) in the village of Dazhdovnitsa, which lasts for a day, but is preceded by a rich programme of accompanying events that starts almost a month earlier, including a series of art schools, art workshop with artists from across the country, short films and more, which attract artists, photographers, filmmakers, poets, artists and translators to the village. With its population of 156 people (by 2007) the

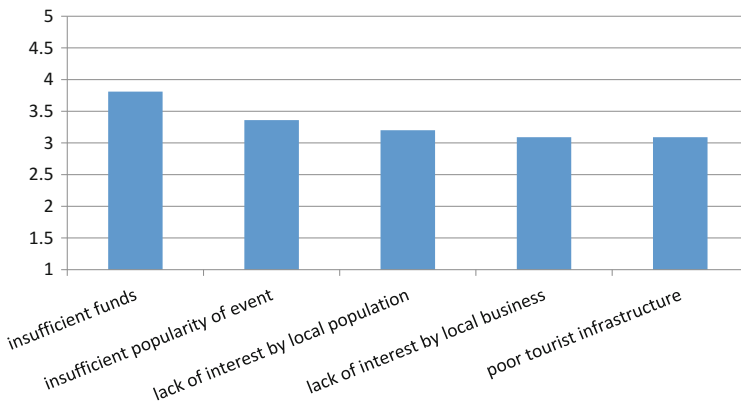
village of Dazhdovnitsa is not among the “usual suspects” for such an event—however, the joint efforts of a Youth Art Movement and the Municipality of Kardzhali, succeeded in establishing a sustainable event by involving the local community, expanding the festival duration and thus providing both social and economic benefits. The broad array of participants—both in terms of country of origin and cultural sphere, has the potential to enable cultural exchange.

When asked about the main difficulties they are facing, respondents place high importance on insufficient funds, followed by lack of popularity of the event, lack of interest by the local population, lack of interest by businesses and poor tourism infrastructure (Fig. 5). In the “Other” section some of the respondents indicate the underdeveloped volunteer activity. Assessment is based on 5-point Likert scale ranging from 1 (not important) to 5 (very important).

Regardless of the stated difficulty in securing the necessary financial resources, however, the majority of the organizers do not consider it necessary to introduce fees for participation.

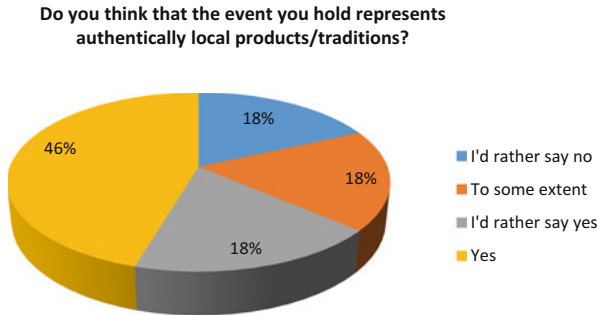
When traditions are used for tourist purposes, it is essential that they be interpreted and presented authentically so as to avoid a negative impact on the culture of the local community. Although almost all respondents said that they have good knowledge of traditions and typical local products, the survey results show a disturbing trend of neglecting authentic representation—18 % of respondents believe that they carry out events which rather do not present local tradition in an authentic way; another 18 % believe that this is done only partially (Fig. 6).

A number of other characteristics of events on local products were also self-assessed by organizers (see Fig. 7). A 5-point Likert scale was used, ranging from Poor (1) to Excellent (5). The lowest rating was assigned to technical equipment and advertising campaign, which directly corresponds to the main difficulties mentioned above. Entertainment program and the accompanying events are rated above average, and the highest rating was received by transport provision and access to the venue, organization, and time and place of holding the event.

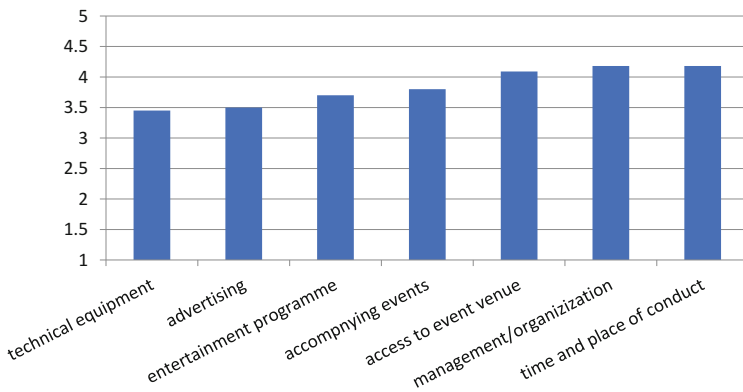


**Fig. 5** Major difficulties in holding the event





**Fig. 6** Assessment of authentic representation of local products/traditions



**Fig. 7** Assessment of event characteristics

Advertising and promotion of events is done through the employment of various channels, the most popular of which are regional media (indicated by all respondents). The Internet ranks second (91 %), national media are used by 64 % of respondents, almost half of them rely on personal contacts, and a relatively small share used email lists, brochures and printed media.

Successful event planning is strongly dependant on feedback from both visitors and participants. The majority of the organizers study the opinion of participants and visitors, mainly by following the positive comments and complaints (60 % of respondents) and assessment of the program, the time and venue of the event. There are some festival organizers however who do not conduct any research on stakeholder satisfaction.

## 5 Conclusion

The study provides a generalized picture of the festival activity in a region, where research on events is extremely limited—the southern part of Bulgaria. Its aim therefore was not to go into detail but rather to outline major trends and issues. It has taken the perspective of organizers as one of the most important stakeholders. Future research might be focused on other stakeholder groups—tourists/visitors, local community, local business with the aim of identifying and comparing different attitudes and expectations.

It might be of interest to compare the findings with similar type of research in other regions. The main reasons for organizing a festival for local products/traditions in the surveyed area are associated with increasing the prestige of the place, the promotion of local products and traditions, and supporting tourism activities, which to a great extent reflects the trends worldwide. The entertainment aspect is of significant importance too. At the same time, respondents assessed relatively low the results achieved in terms of attracting tourists and promoting local business. The exchange of experiences and culture, and entertainment were stated as benefits from holding the event. This once again confirms the role of festivals and special events in tourism development and image building.

While the majority of the organizers manage to attract foreign participants, visitors of the events are mainly from the country, and more than a quarter of all visitors are residents, their relatives/friends and residents of nearby settlements. The main difficulties in organizing the event are related to insufficient funds and insufficient or ineffective advertising. In this regard, more attention should be paid to opportunities provided by the European operational programs, public-private partnerships and wide involvement of volunteers. The identified lack of interest on the part of local communities and the low degree of volunteer activities are very disturbing in terms of sustainability of the event. They could be due to the irrelevant choice of festival subject focus or insufficient efforts by the organizers to collaborate with local communities.

More than one third of respondents feel they do not present local traditions and products in an authentic way. This could lead to an undesirable level of commoditization and as a result lower the quality of the event.

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# The Quality Challenge in Rural Tourism's Services: The Case of Madeira's Country Homes

Elisabete Rodrigues

**Abstract** This article discusses rural tourism, particularly the Country Homes in Madeira Island, focusing on the link between the management of these tourism enterprises and the quality of services provided. Through the identification of the owners', of the Country Homes, profile it was our intention to demonstrate the relevance of the implementation of a Best Practice Guide for a better management of these enterprises, due to the poor training/experience of their owners/guardians.

In the pursuit of our goals we used the combination of qualitative and quantitative methods in the absence of studies of this nature on the island of Madeira, such as the launch of questionnaire surveys, semi-structured interviews, field work and bibliographical and documentary research.

This research allowed us to conclude that the implementation of a Best Practice Guide, which main function is to adjust the tourist practice, with the ultimate objective of promoting the quality of services provided by these tourist enterprises, will be positive and will contribute to the tourism development of the Country Homes in Madeira.

**Keywords** Rural tourism • Best practice guide • Quality of services

**JEL Classification** Z other special topics

## 1 Introduction

Rural tourism is very recent in Portugal and, in particular, in the archipelago of Madeira. In recent decades rural tourism has been present in the country's development policies, counting among its main objectives, the revitalization of rural societies' economic and political fabric.

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The studies that have been done about rural tourism in mainland Portugal have revealed that this tourist segment has not yet reached its desired levels. In the case of the Madeira Archipelago and despite a later implementation, the efforts have shown more positive effects, but slightly distant from the initially expected.

In this article we intend to identify some weaknesses of this tourist segment in Madeira, in the perspective of finding solutions that contribute to sustainable development on the island, from the tourist, economic, social and cultural point of view.

In this guideline, we have chosen to identify the profile of the owners and the relevance of the implementation of a best practice guide on the management of the Country Homes in Madeira, given their weak training/professional experience in the tourism industry and the growing need for improving the quality of services provided.

The theme for this option was based, among other reasons, in the relative lack of studies in this area and in our strong belief that rural tourism, although its very recent roots on the Island, is an area with strong future potential for sustainable development in the tourist sector of Madeira.

## 2 Literature Review

The literature review included different analyses on the subject, which focused in the areas of rural tourism, in the management of tourism enterprises and in particular, in the area of services.

According to Luigi Cabrini, Regional Representative of the World Tourism Organization (WTO) for Europe, the term “rural tourism” is used especially when “rural culture” is the key component of the tourism product offered by that region (WTO, 2004, p. 9). In his opinion, what differentiates the remaining tourism products from rural tourism “is the wish to give visitors a personalized contact, a taste of the physical and human environment of the countryside and, as far as possible, allow them to participate in the activities, traditions and lifestyles of local people” (WTO, 2004, p. 9).

In Portugal, and in strictly legal terms, rural tourism is the one that is practiced in establishments located in rural areas and designed to provide “accommodation services to tourists, while preserving, restoring and enhancing the architectural, historic, natural and landscape aspects of the several places and regions where they are located, through reconstruction, rehabilitation or expansion of existing buildings, in order to guarantee its integration in the surroundings.” (Decree-Law n° 15/2014, section 1, article 18). Also according to the same law, some of these establishments, among them, those classified as Country Homes, are “buildings located in villages and rural areas that are integrated, by its design, building materials and other characteristics, in the typical local architecture” (Decree-Law n° 15/2014, section 4, article 18).

Both in the European as in the Portuguese concepts, the idea of a deep inter-connection coexists between rural tourism and the region’s heritage, which allows

us to conclude that the quality of services provided to tourists, especially in the field of the information to be provided about the locality is one of the priority factors.

Rural tourism has been the subject of some studies, especially in the European context and despite the WTO considering it a potential market, it has not been deeply studied to date (WTO, 2004, p. 9). In Portugal there have been few studies, most of them are of an exploratory nature and many are already outdated in view of the recent changes to the Portuguese legislative framework.

We have found some studies in Portugal, with themes associated with the sector, particularly in the context of regional development, EU policy, geographical expression, sociology, anthropology and information systems (Batista, 2008; Batouxas, 1998; Casqueira, 1992; Cavaco, 1999, 2004; Cavaco & Moreno, 2006; Cravidão & Fernandes, 2004; Cravidão & Marujo, 2012; Cunha, 1986, 1988; Ferreira, 2004; Figueira, 1998; Relvas, 2006; Leal, 2001; Lopes, 2005; Lourenço, 2005; Marques, 2005; Melo, 2003; Mesquita, 2009; Pereira, 2002; Pinto, 2004; Portela & Caldas, 2003; Silva, 2009; Sousa, 2006). Most of these studies are not published, are masters or doctoral thesis, accessible at the National Library of Portugal. Through this framework, it is possible to conclude that Portugal's knowledge of rural tourism is still very incomplete, especially in the Autonomous Region of Madeira.

According to Fernanda Cravidão and João Fernandes (2004) rural tourism "is an activity with recent commercial expression, there are still few structural results of its impact in Portugal. However, some studies in specific areas of the national territory [...] link the development of this activity to a 'quiet revolution' in rural areas" (p. 417).

Regarding the studies related to this subject about Madeira Island, we found no publication or doctoral thesis. As far as we know in the University of Minho, Daniela Alvares was going to develop a doctoral thesis under the guidance of the Assistant Professor Julia Lawrence, entitled "Model of Tourism Life Cycle: A Tool for Rural Tourism Management Applied to Madeira Island" (Alvares & Lourenço, 2007).

According to the World Tourism Organization, rural tourism allows a wide diversification in rural economies, through the preservation of cultural and natural heritage that might otherwise disappear, apart from that its sustainable development can create jobs, develop agriculture, preserve the landscapes and crafts, improve the environment and allow greater involvement by women (WTO, 2004, pp. 9–10).

On the other hand, Manuela Ribeiro (2003) confronts "the markedly favourable views on rural tourism-development binomial" which recently are spread throughout Europe, with studies that challenge and reveal the "the excessive optimism that" (pp. 202–203). This view is also expressed through the studies of Cravidão and Fernandes (2004) who question the multiplier effect of this activity, especially regarding the NW Portuguese: "To an expensive offer correspond weak occupancy rates, still marked by seasonality, which creates difficulties in job and capital creation. On the other hand, at least in this case, the number of families directly involved in this activity is low, because entrepreneurship comes from a narrow and elitist set of local actors" (p. 427).

The last decades have witnessed changes in the tourists' profile, more and more knowledgeable and informed seek to complement and enrich their travel experience by combining different attractions, from the natural to the cultural heritage, trying to uncover and enjoy in a sophisticated way, the area which they are in. To meet the expectations of these visitors, the tourist markets have created special services and tourism products aimed primarily to niche markets (WTO, 1997, p. 117).

These circumstances favour the development of rural tourism on the island of Madeira. Given the territorial area of the island, we believe fair to assume that Madeira has a rich natural heritage, where we can distinguish the Laurel Forest, consecrated in 1999 by the UNESCO as World Heritage, a significant historical and cultural heritage, with a focus on monuments, traditions, crafts, wines, regional gastronomy and some cultural activities of traditional character, especially suitable for this tourism sector. A key condition to compete successfully in this sector is to ensure competitive advantages, being considered as fundamental "the experience of a way of life and environment that offer a Sharp contrast to life in the modern city" (WTO, 1997, p. 122). According to the same source, rural tourism is one of the tourist segments, which features are most likely to meet the principles of sustainability. According to the World Tourism Organization, the development of rural tourism is one of the three main ways that are associated almost immediately to the definition of sustainable development in tourism:

Whereas currently we are dealing more with the questions of how to actually translate the basic content of sustainable development of tourism into concrete activities. We associate primarily with the development of those forms of tourism that are available in specific conditions. The most relevant forms are: Rural tourism development, Cultural tourism development, The third market niche is Ecotourism (WTO, 2007b, p. 79).

Future opportunities for sustainable development of rural tourism in Madeira face additional challenges: endogenous and exogenous constraints hindering its growth as well as competitiveness with the hotel industry in general, similar to those that have occurred in Portugal:

The rural tourism was structured in rural housing and attractions that make up the rural areas, natural and cultural, becoming, at present, as an offer of alternative accommodation but far from the global values of traditional hotels. Nevertheless, given the quality accommodation shortages in these areas, rural tourism represents a significant bulwark between the existing supply. We do not doubt that, if we had not made the effort of three decades in the existing architectural heritage recovery within the country, including solar and rural houses, the development gap would be much higher (Ferreira, 2004, p. 480).

At the heart of the constraints we must emphasize the small size of these companies, the absence of associative spirit, the high cost of factors of production due to geographical isolation, the lack of skilled labour and the weak technology competence.

According to Jorge Osorio (AAVV, 2001), President of the Region of Tourism South Douro, strengthening development strategies in rural areas continued to be a priority in Portugal:

It seems to me, therefore, that the Rural Tourism in Portugal, although with some limited adjustments, should continue its evolution, be structured, taking into account the following: The accommodation, The Animation, The Organization of the Supply, including: Training, Promotion (p. 140).

In Madeira, there is no strategic plan for the development of rural tourism and, in addition these companies require an effective regional competitiveness policy, therefore the organizations should start by eliminating their endogenous constraints. One of the measures introduced in this article is to improve the quality of their services.

The European Commission prepared a document primarily directed to the local authorities and other organizations responsible for tourism, "Towards quality rural tourism—Integrated quality management (IQM) of rural tourist destinations". Although the document contains recommendations and principles specifically targeted to an integrated management policy, the best practice recommendations also apply to small businesses, including the Country Homes, since they belong to the total set (European Commission, 2000, p. 14).

Since we think that this situation has future implications in getting a greater number of visitors, part of the solution is to implement a conduit of best practices to be followed by the Country Homes and also since the Portuguese Norm for "Rural Tourism—Requirements of Service and Features" (IPQ, 2010) was recently published, one of the aims of this paper was to present the relevance of a Best Practice Guide for Country Homes in Madeira offering them a set of guidelines to help these enterprises to fight effectively by checking out their own route on the path of sustainable rural development. According to Eunice Fernandes and Guilherme Guerra (2008), "it appears that a higher academic literature on the subject is necessary, because it is of the utmost importance for tourism, given the benefits that the implementation of quality management systems can bring to companies and tourist cities" (p. 49).

Our literature review was also supplemented by literature's analysis of Hospitality (Marques, 2006, 2007), as well as some books about best practice in Hotel Management, one from the "Tourism of Portugal, I.P." and other one from the "United Nations Environment Programme" (UNEP, 2003), in order to analyse which were the most relevant topics of the guides to best practices, to orient our research. In the absence of an internationally accepted model, we have chosen to follow the model of Portuguese Norm for "Rural Tourism" (IPQ, 2010), introducing some changes and considering some criteria set by the WTO for incorporation by organizations and bodies in an attempt to create a general definition of the product "Rural Accommodation" (WTO, 2007b, p. 187). Although the Portuguese legislation does not cover all these criteria and there are still some components to improve, we believe that in the near future, on the island of Madeira, we can watch the following:

Rural Accommodation [will be] understood as a small-scale hospitality service which combines personal attention, quiet and peaceful setting, and assured quality standards with good conservation of environment, human and cultural authenticity in connection



with the local community and its traditions, products, gastronomy, and heritage, under the limits of security and safeguarding the [local] resources (WTO, 2007b, p. 187).

### 3 Methodology

Results from a larger study were used in the present paper, concerning the sustainable development of rural tourism in Madeira, focusing on the Country Homes, seeking to contribute to a more profound knowledge concerning the development of the Island's rural tourism and the delineation of future strategies. The theme of this article focused on rural tourism, with a special emphasis on the management of tourism enterprises and the quality of services provided.

In this perspective and in general terms, the following objectives were set, in the elaboration of this article:

- Identifying the profile of the owners of rural tourism enterprises in Madeira;
- Demonstrating the relevance of the implementation of a Guide to Best Practices in the management of these tourist enterprises, given the sparse professional training of owners/leaders of Country Homes on the island of Madeira and the growing need to improve the quality of services provided.

In order to pursue our purposes, a bibliographical research on the theme and concepts implicated was conducted. To that effect we resorted to primary and secondary sources.

The non-existence of studies concerning rural tourism in Madeira, confronted us with the need to elaborate semi-structured interviews and questionnaires extensively conducted to many informers, in particular to businessmen and tourists. This supplied us with valuable data through the information gathered which allowed us to fulfil our objectives.

From the 34 Country Homes existing in Madeira 16 of them agreed to collaborate in the present study, which ensured a good representation of the sample (47 %), in relation to the number of ventures and geographical localization, as with the number of replies to the interviews, in relation with the universe in question.

We chose to conduct the interviews to the owners or representatives of the Country Homes, between the months of June and October of 2012.

The present study was supplemented by the investigator's visit to the collaborative Country Homes, this aimed to deepen his knowledge about the facilities and its surroundings. These visits allowed us to compare what we had observed and the knowledge acquired previously, as well as to make relevant conclusions that aided our description and interpretation of the reality in question.

## 4 Results

### 4.1 *The Owners' Profile of the Country Homes in Madeira*

In the interviews made to the owners/representatives of the Country Homes, we found some data that allowed us to understand the current scenario of these enterprises in Madeira.

It was not intended in this paper to characterize exhaustively the owners' profile of the Country Homes in Madeira. It seemed, however, essential to draw some of the main characteristics, because by getting to know them better, we can better understand their opinions, basic motivations and the type of management practiced in their Country Homes.

The average age of owners/representatives shows a high participation especially for the age group above 50 years of age. In the field of occupation, except for two cases who were already retired, the other owners/representatives besides having this occupation, played other major activities, with a strong presence in liberal professions or related to teaching and management of companies. This scenario differs for some studies carried out in mainland Portugal and in our opinion contributes to the existence of different attitudes. In Manuela Ribeiro's view, rural tourism owners reveal a rather different profile:

Sustained by insurance income from pensions and other sources, these owners are in fact a significant segment of rural tourism, offering major talents: knowledge about the history, culture ethnography of its regions; great time available for the personalized service of its customers; capacity and social relationship skills cleared over decades of years of professional experience, etc. (Ribeiro, 2003, p. 211).

Regarding the basic motivation for the development of this professional activity, we asked three questions to the owners. The first, how they had become building owners; the second, what was the motivation to explore the building as rural tourism—Country Home and the third, if they held prior work experience in the tourism industry.

By analysing the answers to the first question, we hold true that 7 buildings had been acquired (44 %), while 9 buildings (56 %) had been inherited. Of the purchased, five (31 %) were initially purchased as holiday houses and only two buildings (12 %) were actually acquired for the purpose of investing in rural tourism.

In the second question, the owners were unanimous in their responses to the "Rural Tourism—Country Home" option, which justified stating that the property type and its location offered the ideal conditions for this type of activity. As for the reason that motivated them to explore the building, 13 owners (81 %) stated that the decision was related with a profitable way to keep the "House" and only three owners (19 %) stated that the decision was associated with the motivation for the sector.

As for the third question, from the 16 respondents only five (31 %) confirmed to have previous experience in the tourism industry.

The answers to those two questions may not seem very relevant in a first analysis, however this situation will become responsible for lower or higher quality of services, for the best or worst management and promotion of the establishment and in a final stage, by the low demand of this type of tourism, as already referenced in several studies, including:

The farmer and the head of the agricultural family turns into an innkeeper, serves meals at his house, shows the farm and the work that takes place there, sells its products, provides information on the area and on the local culture, constitutes himself as the public relations of the space in which he appears and the very image of the destination to which he belongs, but does not pursue a policy of employing professionals with the necessary qualification, because payable wages are high, the activity is seasonal and small scale, so he chooses to move employees from rural activities for support activities to tourists, or seasonal employees . . . , an attitude that does not allow to maintain a service whose quality level is expected by the upper middle and middle class tourists who visit rural areas (Ferreira, 2004, p. 65).

In the quote above, Ferreira (2004) showed us the scenario “the farmer” who became an innkeeper, a situation with greater connection to agritourism than actually to Country Homes, although this picture is broadly similar in the modality under study. Another study reveals that most promoters enjoy other sources of income, including retirement checks and that “the reception of tourists is seen as a certain ‘hobby’ that will give some income (to keep the house)” (Jesus, Kastenholz, & Figueiredo, 2008, p. 13).

In the conclusions of the “I Conference on Tourism, Heritage and Environment” of Silves, among the set of principles and factors to improve, training was also mentioned, “whether of qualified technicians who contribute to enhance Rural Tourism, [ . . . ] or of retail investors and people already installed, in order to qualify the offer of services and support management” (AAVV, 2000, p. 66).

The authors cited above reveal the importance of vocational training in rural tourism in Portugal. This debate is not new, in fact the Seminar on “Social Exclusion and Rural Tourism”, held in Almeida, in 1992, among the conclusions reached by the working groups, the importance of professionalism was highlighted, specially by launching training programs aimed at tour operators and owners of rural tourism enterprises, whose training activities should focus “in the following plans: technical—recovery equipment, management, etc.; reception of tourists; [ . . . ] professionalize the actors in the rural areas (owners, craftsmen) in the activities related to tourism” (AAVV, 1993, pp. 25–33).

The scenario found in Madeira, related to the owners of these businesses, is not very different from the studies carried out in Portugal, especially the already referenced throughout this investigation, so based on these and the responses received we can conclude that for the majority of the owners of these Country Homes, the investment was the result of the need to economically maintain a building that they had originally purchased for their own use or that had been inherited and not as a result of a strong motivation for the tourism sector or previous experience in the tourism industry, which will be reflected in project management,

quality of services, and consequently in the demand of rural tourism, as well as the economic and socio-cultural impact of it in rural areas.

Portuguese legislation, till 2011, required a “professional card” to the hotel directors, deputy directors and assistant directors of hotel establishments to exercise the respective profession, which was granted only in the compliance of certain requirements. By the Decree-Law n° 49/2011 of 8 April, those requirements were eliminated, since that did not fit the guiding principles for the regulation of professions—reform of vocational training, approved by Resolution of the Council of Ministers no 173/2007 of 7 November. However in the above Decree-Law is safeguarded the need for specific skills for this profession:

In addition, in a comparative law analysis, it appears that most of the member states of the European Union opt for free access to the profession. It is not intended to remove the need for qualification of human resources in the tourism sector, particularly those in positions of director of hotel functions, verifying, rather, that it should not be for the State to ensure that qualification, for such being the normal functioning of the labour market enough, with employers to seek, at all times, human resources enabled with the right skills to the desired profile for the performance of their duties (Decree-Law n° 49/2011 of 8 April).

As we could see, the owners/representatives of Country Homes, are not “empowered with the right skills for the desired profile required to perform their duties” and in accordance with the legal diploma it is understood that “normal functioning of the market” can determine the success or the failure of the enterprise in the business perspective and in the sustainable development of rural tourism in Madeira:

Rural tourism is seen as an engine of sustainable development in rural areas [. . .]. One of the heaviest burdens is the mentality of rural entrepreneurs not seeing in rural tourism their main source of income, striving very little in these businesses, giving up professional management of their tourist establishments. At the same time, the range of complementary activities and micro equipment is usually non-existent (Caldito, 2008, p. 32).

According to the legal framework for installing, operating and running tourist developments, the owners or their representatives may or may not reside in the venture. Although not required for this type of rural tourism, it is appropriate that the owner or his representative dwell in the enterprise or in the vicinity thereof so that he could more effectively offer the visitor the “family nature environment” and the frequent contact between the owner and visitor, characteristic of this type of tourism. In interviews conducted we found out that none of the owners/representatives lived in the venture, except for two owners (12 %), who confirmed that they resided close to the tourist establishment.

This scenario clearly reflects the scant training/experience of the owners/representatives of Country Homes in Madeira and the possible consequences for the quality of services provided, as evidenced by the results of the questionnaires hand out to visitors, shown in the following section.

### 4.2 *The Relevance of Applying a Best Practice Guide in the Country Homes Madeira*

Since we think that the situation described above has future implications in attracting a greater number of visitors, that part of the solution is to implement a conduit of best practices preconized by the Country Homes and that recently was published the Portuguese Standard for Rural Tourism—Conditions of service and features “(IPQ, 2010), one of the aims of this paper is to demonstrate the need for this requirement, which might offer the Country Homes in Madeira a set of guidelines to help these enterprises make their own route in the path of sustainable rural development. According to Eunice Fernandes and Guilherme Guerra (2008), “it appears that a higher academic literature on the subject is necessary, because it is of the utmost importance for tourism, given the benefits that the implementation of quality management systems can bring to companies and tourist cities” (p. 49).

To enable the reader to gain a more solid idea about the current situation of these enterprises in a perspective of the offer quality, we will begin by showing, in a detailed way, some results of the visitor surveys, which reflect the degree of satisfaction of visitants in the assessment of the accommodation units.

According to “Table 1” on the variable “Personal treatment—professionalism”, despite the mode had been 10 points, there was only 22.2 % of respondents attributing this maximum rating. The second largest percentage of responses, 19.5 % covered the 7 points and 22 % of the responses focused on ratings equal to or less than 6 points, beyond which there were two respondents who chose to not assign any classification.

**Table 1** Guest satisfaction degree—accommodation: personal treatment—professionalism

Classification (1–10 points)		N	%	% Valid
Valid	1	3	1.8 %	1.9 %
	2	1	0.6 %	0.6 %
	3	4	2.4 %	2.5 %
	4	6	3.7 %	3.7 %
	5	6	3.7 %	3.7 %
	6	16	9.8 %	9.9 %
	7	32	19.5 %	19.8 %
	8	30	18.3 %	18.5 %
	9	28	17.1 %	17.3 %
	10	36	22.0 %	22.2 %
Total		162	98.8 %	100.0 %
No reply		2	1.2 %	
Total		164	100.0 %	

N = Frequency

Source: Author’s own study on the basis of data provided through the Country Homes’ Visitor’s questionnaires (2012)

**Table 2** Guest satisfaction degree—accommodation: meals

Classification (1–10 points)		N	%	% Valid
Valid	1	10	6.1 %	14.5 %
	2	0	0.0 %	0.0 %
	3	1	0.6 %	1.4 %
	4	3	1.8 %	4.3 %
	5	2	1.2 %	2.9 %
	6	7	4.3 %	10.1 %
	7	5	3.0 %	7.2 %
	8	14	8.5 %	20.3 %
	9	8	4.9 %	11.6 %
	10	19	11.6 %	27.5 %
Total		69	42.1 %	100.0 %
No reply		95	57.9 %	
Total		164	100.0 %	

*N* = Frequency

*Source:* Author’s own study on the basis of data provided through the Country Homes’ Visitor’s questionnaires (2012)

The immediate reflection induced by these data is the lack of professionalism in personal treatment of the visitors, in about half of the Country Homes of the sample. According to António Ferreira (2004) one of the constraints of rural areas comes from the “lack of technical and scientific preparation of the human resources, in particular from those which have the task of providing tourist information” (p. 482). In this field, we remind the reader that in most of the Country Homes of Madeira, the owner/representative of the enterprise has the job to meet the guest and provide tourist information, so we agree with the opinion of António Ferreira (2004) when he says the following:

It is crucial that the functions in question are carried out by professionals with adequate technical and scientific preparation, with a higher level, so that their skills can acquire new dynamics, especially in terms of knowledge of the fundamentals of tourism as a science. The pragmatic response to requests from increasingly complex and qualified order should be the posture of human resources in tourism (p. 482).

As we can see from the analysis of “Table 2”, in what concerns the meals, despite the mode is situated in 10 points, it is urgent to point out that all the three best ratings reached 25 % of total respondents and 57.9 % of respondents chose not to grant any classification of this variable. According to the Portuguese law, the Country Homes are not required to serve main meals, provided there are restaurants within 5 km from the property, however breakfast is a service that should be included in the accommodation price. Throughout our study, we found that only five enterprises (31 %) met this legal requirement. Therefore we understand that the majority of respondents could not classify something they did not have access to, a situation that should undergo a major restructuring in the future.

According to “Table 3”, the mode of the variable “Animation”, reflects the reality, it stood on the lowest rating: 1 (one) point. This variable presents a more

**Table 3** Guest satisfaction degree—accommodation: animation

Classification (1 a-10 points)		N	%	% Valid
Valid	1	9	5.5 %	19.1 %
	2	6	3.7 %	12.8 %
	3	3	1.8 %	6.4 %
	4	0	0.0 %	0.0 %
	5	1	0.6 %	2.1 %
	6	4	2.4 %	8.5 %
	7	8	4.9 %	17.0 %
	8	6	3.7 %	12.8 %
	9	3	1.8 %	6.4 %
	10	7	4.3 %	14.9 %
Total		47	28.7 %	100.0 %
No reply		117	71.3 %	
Total		164	100.0 %	

*N* = Frequency

Source: Author’s own study on the basis of data provided through the Country Homes’ Visitor’s questionnaires (2012)

deficit scenario than that of the “Meals”. In this particular case 71.3 % of respondents chose not to answer and the set of the three best ratings obtained only 9.8 % of the responses. These results confirm the findings of the interviews made to the owners/representatives of the establishments in relation to additional planned activities services provided by the Country Homes. In fact 14 establishments (88 %) confirmed that there was no offer made to their guests in terms of animation, while two establishments (12 %) testified that their guests were invited to participate in agricultural labours.

In our opinion the component “Animation” goes beyond the boundaries of acceptable contexts. As Ferreira (2004) notes: “Animation is central to the development of tourism and regions, it allows the integration and retaining of the visitors, therefore, to study the tourists and the opinions of those who attend a given area is one of the primary missions of tourist destinations” (p. 485).

By analysing the “Table 4”, the variable of sustainability, we verified that despite the mode displayed the highest score, it only reflects the responses of 17.1 % of the respondents, so the results illustrate that this is one of the variables with strong improvement need and that the Country Homes could have greater benefits if they tried to offer a more sustainable tourism: “while seeking long term profitability, they should be concerned about their corporate image, the relationship with their staff, and their impact on the global environment and that immediately around them” (WTO, 2007a, p. 12).

According to “Table 5”, the connexion “Quality/Services/Price Ratio” analysed by the visitors reflects, mostly, the situation of the variables that we have been presenting. First of all, 3 % of respondents chose not to answer, which immediately allows us to think that they failed to assign a rating to this variable. The reasons may

**Table 4** Guest satisfaction degree—accommodation: sustainability/concern for the environment

Classification (1–10 points)		N	%	% Valid
Valid	1	1	0.6 %	0.7 %
	2	2	1.2 %	1.3 %
	3	5	3.0 %	3.3 %
	4	8	4.9 %	5.3 %
	5	14	8.5 %	9.3 %
	6	17	10.4 %	11.3 %
	7	24	14.6 %	15.9 %
	8	26	15.9 %	17.2 %
	9	26	15.9 %	17.2 %
	10	28	17.1 %	18.5 %
Total		151	92.1 %	100.0 %
No reply		13	7.9 %	
Total		164	100.0 %	

N = Frequency

Source: Author’s own study on the basis of data provided through the Country Homes’ Visitor’s questionnaires (2012)

**Table 5** Guest satisfaction degree—accommodation: quality/services/price ratio

Classification (1 a-10 points)		N	%	% Valid
Valid	1	2	1.2 %	1.3 %
	2	0	0.0 %	0.0 %
	3	4	2.4 %	2.5 %
	4	6	3.7 %	3.8 %
	5	6	3.7 %	3.8 %
	6	18	11.0 %	11.3 %
	7	22	13.4 %	13.8 %
	8	41	25.0 %	25.8 %
	9	40	24.4 %	25.2 %
	10	20	12.2 %	12.6 %
Total		159	97.0 %	100.0 %
No reply		5	3.0 %	
Total		164	100.0 %	

N = Frequency

Source: Author’s own study on the basis of data provided through the Country Homes’ Visitor’s questionnaires (2012)

have been diverse, but according to the foregoing thought, we can assume that behind this attitude lies a total disagreement in the correspondence between the quality of services provided and the price charged. Second, only 12.2 % of respondents gave a rating of around 10 points and the mode of responses stood at 8 points, with 25 % of responses. Third, the answers in equal ratings or below 6 points represented 12 % of respondents.



**Table 6** Guest satisfaction degree—accommodation: access to new technologies

Classification (1–10 points)		N	%	% Valid
Valid	1	6	3.7 %	4.2 %
	2	5	3.0 %	3.5 %
	3	8	4.9 %	5.6 %
	4	11	6.7 %	7.7 %
	5	9	5.5 %	6.3 %
	6	18	11.0 %	12.7 %
	7	21	12.8 %	14.8 %
	8	31	18.9 %	21.8 %
	9	22	13.4 %	15.5 %
	10	11	6.7 %	7.7 %
Total		142	86.6 %	100.0 %
No reply		22	13.4 %	
Total		164	100.0 %	

*N* = Frequency

Source: Author’s own study on the basis of data provided through the Country Homes’ Visitor’s questionnaires (2012)

Opposing to what one of the owners said during the interviews, supporting that their guests while searching for a Country Home, aspired to feel a “pure environment, conducive to meditation” and did not want to be bothered, so the Internet access in the establishments was unnecessary, the results of visitor surveys point to a divergent reality.

Under the Access to new technologies, the mode of the responses in “Table 6”, of around 8 points, which, as in previous cases, does not give us a clear idea of the results of this variable. First, 13.4 % of respondents chose not to answer this question. Second, only 6.7 % of the visitors gave the maximum score (10 points). Third, the answers in equal ratings or below 6 points represented 35.8 % of respondents, while the set of the three highest rates comprised 39 % of the responses, which allows us to conclude that in the future, this is one of the aspects not to be overlooked by the Country Homes in Madeira.

Regarding the “Information about the area” provided by Country Homes in Madeira besides being scarce and lacking in detail, we confirmed that it did not comply with legal requirements. This reality is perfectly reflected in the results of the surveys answered by the visitors. Analysing the results of “Table 7”, despite the mode being 8 points, we found out that 10.4 % of respondents chose not to answer the question; only 9.8 % gave a maximum score (10 points) and the answers in the same classifications or less than 6 points, accounted for 31. % of respondents, while the set of the three highest rates covered only 45.1 % of the responses.

To complete this framework, we must add that the second most frequent suggestion of the visitors fell on the information provided by the establishments about the locality or region (15 references in a total of 53 responses). According to Ferreira (2004) the “weaknesses lie at the level of care and supervision of tourists

**Table 7** Guest satisfaction degree—accommodation: Information about the area

Classification (1–10 points)		N	%	% Valid
Valid	1	4	2.4 %	2.7 %
	2	6	3.7 %	4.1 %
	3	7	4.3 %	4.8 %
	4	6	3.7 %	4.1 %
	5	12	7.3 %	8.2 %
	6	17	10.4 %	11.6 %
	7	21	12.8 %	14.3 %
	8	33	20.1 %	22.4 %
	9	25	15.2 %	17.0 %
	10	16	9.8 %	10.9 %
Total		147	89.6 %	100.0 %
No reply		17	10.4 %	
Total		164	100.0 %	

*N* = Frequency

*Source:* Author’s own study on the basis of data provided through the Country Homes’ Visitor’s questionnaires (2012)

and even more, in the fact that a fundamental aspect to stimulate the activity and performance of the region was neglected, which was the information on the supply of the surrounding areas of the houses. An essential attitude for the economic development of tourism spaces” (p. 485).

Finally, we analysed the sequence of variables treated previously and which denoted the greatest needs in the sphere of a future improvement. Based on the percentage of response of the three highest rates (10, 9 and 8 points) obtained in each variable, the fields that we assessed as High Priority in future improvement plan were essentially, and in descending order of importance, the “Animation”, the “Meals”, the “Access to New Technologies”, the “Information about the area “and the “Sustainability/Concern for the Environment”. In the Medium Priority, we went with “Personal treatment—professionalism” and “Quality/Services/Price Ratio”.

This scenario can be completed with the results of another question asked to visitors about the possibility of return or if they recommended the establishment. Of all the respondents, 21.3 % did not retain a favourable image of the tourism unit. Since they didn’t plan to “recommend” the establishment to anyone, we looked at that as a relatively high number, which could be unfavourable to some tourist units, since today we are fully aware that tourists “are seeking a high quality experience in safe and attractive environments, in which they can appreciate different cultures or simply enjoy different climates. Tourists are becoming more aware of the impacts of their travelling, while not willing to renounce to it, but rather becoming more selective about their choice of destinations” (WTO, 2007a, p. 12).

To mark a distinctive position in a highly competitive market, the Country Homes in Madeira should offer the visitor a service marked by competence, efficiency, innovation and dynamism, that is, “they should innovate in terms of products and their marketing in order to achieve a possibly unique profile, based on

their own recourses and strengths” (Hummelbrunner, 1993, p. 131), ultimately a quality service, a primary element in any competitiveness and sustainability strategy. According to Francesco Frangialli, a region’s tourism policy should reflect “the twin and related needs of competitiveness and sustainability” (WTO, 2007a, p. 2).

We have tried to highlight some of the key elements of the current situation of Country Homes in the island of Madeira. But the commitment and goodwill of the owners may suffice, therefore, initially, the relevance of the application by the owners/representatives of a Guide of Best Practices in the management of their establishments is duly justified, which can help provide a quality rural tourism experience to the visitors and at a later stage, the eventual recognition of the establishment’s quality through a quality certification.

## 5 Conclusion

During the interviews to the owners/representatives of the Country Homes and during our visits to the establishments of the sample, we witnessed a number of situations that did not fit with the applicable legislation, nor with the quality service that should meet the expectations of visitors. On the other hand, the results of the surveys answered by the visitors corroborated this reality and support the need of the existence of a guide of best practices that contributes to sustainable development of this tourism sector.

Among the various situations to report, we considered pertinent to mention, among others, the convenience in a more professional service; the importance of a quality certification or environmental; the relevance of the information provided by tourist unit about the locality or region, particularly at the level of events and cultural attractions; the access to new technologies, especially the “Internet”; the range of entertainment to guests focused on cultural resources of Madeira, as well as the compliance with the applicable legislation.

According to Albano Marques (2006) management “is the process through which one uses what one has to do, what one wants (or what is needed). What we have are the resources, what we want (or what that is needed) is to achieve the company’s objectives and targets” (p. 283).

With limited resources, one of the major management challenges is how to use them to achieve the desired goals. In the Country Homes this responsibility is attributed to the owner, who may delegate it to a legal representative who should have the knowledge and skills to execute it.

With the application of a best practice guide in the Country Homes in Madeira, we want to encourage the owners of these tourist enterprises to continuously improve the quality of their services and thus contribute to the sustainable development of the rural tourism modality, with positive impacts on the economy, as well as in aspects related to society, culture and environment.

A best practice guide enrolls principles and recommendations, being its main function to lead the tourist practice, with the ultimate objective of promoting the quality of services provided by these tourist enterprises, that despite having a tiny accommodation capacity, can achieve a strong relevance in the development of tourism: "A small inn on the roadside with ten rooms, four or five employees, diligent and knowledgeable owners and aware, can be as important for tourism as the Palace of a big city, which serves 30,000 people a year, with 400 employees and super luxurious facilities" (Marques, 2006, p. 31).

In addition to the urgent need to implement a guide of best practice, considering the profile of the owners and that many of them are essentially investors who want to capitalize their capital/real estate, one of the main conclusions that rose from this article, regarding the management of these enterprises, was the following: Whenever an owner does not have knowledge and skills in management of tourism businesses, he should deliver the management of the establishment to a qualified professional technician.

These conclusions, on the other hand, open the door to future research in other areas of tourism, such as in rural areas that can serve to boost the development of this tourism sector, taking into account the different synergies that can trigger, at various levels, economies and rural societies.

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# The Effect of VFR Tourism on Expatriates' Knowledge About the Destination

Chris Dutt, Ivan Ninov, and Donna Haas

**Abstract** Visiting Friends and Relatives (VFR) has become an increasingly popular research area with more consideration being given to this lucrative market. However, much of the literature reports that VFR is still underestimated and underreported. At the same time, the number of expatriates has been increasing, further stimulating VFR travel. This study considered the impact VFR travellers had upon their expatriate hosts' ability to learn about the destination in which they reside. Face-to-face interviews were conducted with expatriate residents in Dubai to uncover the VFR traveller's impact on the expat-host from a learning standpoint. Results indicated that participants did learn about Dubai as a result of their visitor, largely due to an implied feeling of duty towards their visitor. As a result of this duty, expat-hosts learnt about tacit elements of Dubai, such as its history and culture, while also becoming more familiar with particular surface-level elements, such as hours of operation for shops and entrance fees for various types of entertainment.

**Keywords** Visiting friends and relatives • Expatriates • Learning • Hosts • Adjustment

**JEL Classification** J10

## 1 Introduction

Within the field of tourism, little consideration and research had been dedicated to the niche market of VFR (Visiting Friends and Relatives), commented on by many researchers (Backer, 2007, 2008, 2010; Bischoff & Koeing-Lewis, 2007; McKercher, 1996; Morrison, Woods, Pearce, Moscardo, & Sung, 2000). This can now be said to be a cliché, with numerous researchers having dedicated much more focus to this field (Moscardo, Pearce, Morrison, Green, & O'Leary, 2000). While this appears to be the case, a potentially vital component has been missed.

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Researchers have studied the impact of VFR travellers on the destination, reasons for attracting VFR, the activities of VFR travellers and the impact of the host on VFR travellers (see Backer, 2007, 2008, 2010). However, other than Shani and Uriely (2012), there currently has been no consideration of the impact VFR has on the host, and more specifically, the expat community largely responsible for increasing VFR travel numbers (Seaton & Tagg, 1995). Even the one exception of Shani and Uriely (2012) did not specifically focus on expats and instead focussed on the impact of visitors upon the host in general, with no regards for learning.

The benefits of VFR travel have often been under-reported by both previous literature and industry alike (Morrison et al., 2000). VFR has, rather surprisingly, been found to contribute to numerous elements of the tourism industry and even commercial accommodation (McKercher, 1996). This fact is important for two key reasons; firstly, the VFR market is misunderstood and underestimated. Secondly, VFR does contribute to the local society in an economical and societal sense (Morrison et al., 2000).

The purpose of this study is to understand the influence of VFR travel on the expatriate-hosts' ability to gain knowledge about the destination in which they reside, an area that has received nothing but an implied passing reference. If the true nature of VFR travellers' impact on the host community is better understood, it can help tourism businesses who wish to also target the local, specifically expat population, better enabling the creation of a 'host/guest product' (Morrison et al., 2000), and it can help businesses' whose goal is to increase education or awareness amongst the expatriate population. Expatriates specifically are being targeted in this study because of the greater need for expatriates to learn and gain knowledge about their society in order to help with adjusting to the new environment (see Shim & Paprock, 2002). In short, the focus of this research questions 'What influence does the VFR traveller have over the expat-hosts' ability to gain knowledge about the destination?'

A qualitative methodology with face-to-face interviews was chosen to help explain and describe the nature of learning amongst expat-hosts as a result of their visitors. The population and sample for this study constituted expatriates residing in Dubai.

In order to provide maximum insight into this area, this study had the objectives to:

1. Gain more insight into the nature of VFR travel
2. Better understand factors that influence expatriate-hosts
3. Improve the understanding of how VFR travellers influence expatriate-hosts to learn about the destination

The first objective was achieved by a thorough review of the literature, while the second and third objectives were completed through qualitative interviews with expatriate hosts.



## 2 Literature Review

### 2.1 Defining VFR

One issue that seems to hinder the research and the development of understanding of VFR is a consistent definition (Backer, 2007). The field of VFR is deceptively complex in terms of its operational definition, with numerous researchers disagreeing on an accurate description of 'VFR'. Some researchers claim that VFR can be studied from four distinct perspectives: the reason for travel, a travel motivator, a vacation activity or the accommodation chosen (King, 1994; Morrison et al., 2000, p. 103). Some authors have even claimed that VFR tourism is synonymous with ethnic tourism, with the latter only differing because of the motivation for travel (King, 1994). In other cases, the definition is understandable, but implementation of the definition causes issues. Backer (2007) explains a number of studies which adopted the travel motivation definition of VFR, that is, a VFR traveller is "one who reported visiting friends and relatives as the major purpose of the trip" (Yuan et al., 1995, p. 19, as cited in Backer, 2007, p. 368). While this definition is simple and logical enough, in practice this causes issues when travellers claim they are visiting friends or relatives, while they actually spend negligible time with friends or relatives, or they do not claim they are visiting friends or relatives when they actually are (Backer, 2007). The issue is therefore not a misunderstanding of VFR travel or the travellers' attempts to deceive the researcher, but rather the traveller being unaware of their actual travel motivation in general or according to scientific definitions. The same is true when the accommodation perspective is taken, some VFR travellers will stay with friends or relatives but cite a motivation other than VFR, while some stay in commercial accommodation and cite VFR as their reason for travel (Backer, 2007).

Adding to the confusion is the fact that some researchers have suggested that a disaggregation should occur between VF and VR, that is, one should talk about Visiting Friends (VF) and Visiting Relatives (VR), not VFR, because of the innate differences between the two parties in their travel, activity, and purchase habits (Bischoff & Koeing-Lewis, 2007; Seaton & Tagg, 1995). Lockyer and Ryan (2007) examined three areas of VF and VR; visitation patterns, reason for visit, and satisfaction with the activities. They found a number of differences within these areas in relation to whether the visitor was a friend or relative when travelling to New Zealand. For example, VR travellers were more likely than VF travellers to visit Hamilton Gardens, Hamilton Zoo, restaurants, and Hamilton shops (p. 63). Additionally, VR travellers often explained their reason for travel by using terms such as 'Family' or 'Children' and demonstrated satisfaction with different activities to VF travellers. Apart from differing satisfaction levels, it would also appear that VR travellers were, on the whole, more satisfied than their VF counterpart. The apparent inherent differences between VF and VR visitors' behaviour proposes that differences may exist due to their relationship with the expat-host.

For the purpose of this study, the operational definition that will be applied will take the approach of hosts who cite their visitors' reason for travel as being VFR orientated (Morrison et al., 2000). It is beyond the scope of this study to critique travellers' self-classification of their travel behaviours, and therefore, a travel motivation approach will be most applicable. Additionally, the study will be targeting the hosts and not the travellers themselves. Similar studies targeting the hosts (Bischoff & Koeing-Lewis, 2007; Shani & Uriely, 2012) have shown little concern for a scientific definition of VFR and focussed on participants' interpretation of who constituted a VFR traveller.

## 2.2 *VFR Travel*

By conducting basic analysis on the figures provided by Tourism Research Australia (2011) and Visit Britain (Trends by Market, 2011), it is possible to see that in the case of Australia, a total of AUS\$ 2.1 billion (US\$ 1.96 bn) was spent by VFR tourists and in the UK, this figure was £3.5 billion (US\$ 5.76<sup>1</sup>) by year end 2010. This constitutes about 12 % of total tourist expenditure in Australia and 23 % in the UK. In both cases, VFR constitutes the third largest source of revenue after business and holiday for the UK, or education for Australia. In terms of the expanse of VFR travel, Hu and Morrison (2002) found that close to half of the visitors to the United States indicated that their main travel motive was VFR (p. 201). This influence has also been reflected by Backer (2007) who conducted more detailed analysis and determined that VFR travellers do, on average spend more than non-VFR travellers when the accommodation expense has been removed. In 2010, global tourism receipts were around US\$ 919 billion (World Tourism Organisation [UNWTO], 2011). If this expense range of 12–23 % is extrapolated for global tourism receipts, then VFR can be said to have attributed roughly US\$ 110 billion to US\$ 211 billion. In fact, it has been estimated that 'family tourism' has contributed around US\$ 137 billion globally in 2012, 12.5 % of the total tourism market ("Family Tourism", 2014). This demonstrates the potential economic impact of VFR travel as commented on by many researchers (Backer, 2007; Jackson, 2003).

## 2.3 *VFR and Expats*

Throughout the review of literature which focusses on VFR travel, occasional hints have been made to the potential influence of VFR travellers on their hosts. However nothing specific has been considered. Backer (2008) summarised the current extent

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<sup>1</sup> Currency exchange rates obtained from oanda.com on 4th September, 2014.

of consideration granted by previous research to the role of hosts “The VFR traveller is visiting the host and hosts are likely to influence, to varying degrees, the relationship of the VFR traveller with each other element in the whole tourism system” (p. 61). This sentiment has been echoed by many other researchers (Backer, 2007; 2008), while the inverse, the VFR traveller’s influence on the host, has barely received anything but an implied passing reference. Morrison et al. (2000) were among the most detailed researchers in this regard, other than Shani and Uriely (2012), when their findings indicated that a perceived benefit of VFR travel from the perspective of tourism marketing directors is that it ‘Gets locals involved in tourism’, ‘Increases visitor numbers to attractions’ and ‘Encourages locals to spend’ (p. 111). While the former was the 8th most frequent response out of 33 perceived benefits of VFR, it was not given any further consideration. Backer (2007) observed that when VFR travellers undertake tourism activities, they appear to have the ability to encourage the local residents to also partake in these activities. However, no further consideration or analysis was dedicated to this area. Additionally, Morrison et al. (2000) proposed that destinations could offer ‘host/guest products’, designed to cater towards both the host and the tourist. Morrison et al. explained that this would be beneficial in encouraging VFR travel because of the influential role the host plays. When this is taken into account with the finding that VFR travellers were perceived to favour natural, cultural, and historical sites, (Morrison et al., 2000) there is evidence of great potential to encourage hosts to gain knowledge about the destination. This dimension was, like that with other literature, left solely to implication.

Shani and Uriely (2012) conducted the only study to specifically focus on the hosts by interviewing residents of a city in Israel to uncover the hosts’ perception of how “Hosting Friends and Relatives” (HFR) affected them. The results of the interviews indicated that hosts were affected by hosting friends and relatives through spatial, economical, socio-psychological and physical impacts. Economic impacts referred to the financial implications of hosting friends and relatives. The socio-psychological impacts appeared to refer to social requirements of “being a ‘good host’” (p. 429). This ‘requirement’ resulted in a stressful time for hosts in terms of ensuring their visitor was cared for. Spatial and physical impacts seemed to be very similar; however, spatial impacts seemed to refer to the elements of privacy and awareness, while physical elements seemed to relate to actions such as cleaning and food preparation. The spatial impact led to a feeling that the host was “. . . becoming a tourist in one’s own backyard” (p. 435), due to a desire to accompany their visitors on trips around the city (cf. Young, Corsun, & Baloglu, 2006). From an influence stand-point, the fact that hosts felt as if they were required to act in a certain manner when hosting friends and relatives does provide an interesting perspective. This would suggest that the visitors’ presence has an immediate impact in how the host behaves, or feel they should behave. While Shani and Uriely’s (2012) study does provide the first attempt at understanding the impacts upon the host of hosting friends and relatives, the impact upon their learning as a result of VFR and the reasons behind the visitors’ influential nature remain unclear.

The growth in VFR travel has been linked to a number of global socio-demographic developments occurring in recent years, such as the increase in expatriation (Shim & Paprock, 2002). There has been a growth in companies and organisations seeking international expansion as a method to achieve corporate growth and, as such, have been demanding the skills of expatriates who can help the organisation set up in new destinations (Shim & Paprock, 2002). Jackson (1990, as cited in Lockyer & Ryan, 2007) found that VFR travel was a result of migration and, surprisingly, also a cause of migration. Jackson (2003), in a reprint of his 1990 paper, explains that migration causes VFR as friends or relatives travel to visit their expatriated fellows. Additionally, Jackson (2003) describes how, in some countries, VFR travellers stay with their host for an extended period before seeking legal, or illegal, residency (p. 18). The growth in expatriation has continued despite the recent economic turmoil, albeit the rate of growth has been affected (Zlotnik, 2010). It has been found that the growth in expatriation is positively related to the growth in VFR travel as family and friends travel to visit the expat or as the expat travels home (Seaton & Tagg, 1995). The lack of consideration for the host alone is surprising since, as explained by Young et al. (2006) "...residents may also participate in activities they do not normally engage in simply to accompany the visitor...they act like tourists in their own backyards." (p. 498; Shani & Uriely, 2012). When we look at Young et al.'s (2006) statement in the context of expatriates being influenced in some manner, it is feasible to make a connection between VFR travellers influencing the expatriate-host to become a tourist in their new home. The question is, does this relationship exist, and to what extent? As with many other researchers, Shim and Paprock (2002) focussed their study on what can be done to help expatriates adjust and gain knowledge about their new culture. This research emphasis indicates a concern for the fact that "...an employee's failure to carry out a job assignment in another country results from the employee's, or their spouse's, inability to adapt to a foreign culture." (p. 14). If all these statements and ideas are linked, then it is possible to theorise that VFR has the potential to influence expatriate-hosts to become a tourist in their new home, learn more about the local society and culture, and better adapt to the destination. This study intends to shed more light on this proposed theory.

### 3 Research Method

This study followed a qualitative methodology through the use of face-to-face interviews with expatriates in Dubai. Semi-structured interviews were conducted with expatriates, with the intention of discovering the expats' behaviour with the VFR traveller and what knowledge the expat has gained about the destination as a result of the VFR travellers' presence and influence.

Qualitative research is designed to "...uncover motivations, reason, impressions, perceptions, and ideas that relevant individuals have about a subject of interest." (Peterson, 1994, p. 487). This means that this study is perfectly suited

to a qualitative methodology due to the lack to literature on the topic (Shani & Uriely, 2012). The study conducted by Shani and Uriely (2012) demonstrates the need and applicability of qualitative research to this field of research. More specifically, this study undertook a grounded theory method which attempts to explain and describe phenomena concurrently (Corbin & Strauss, 1990). This methodology has not been covered in the literature demonstrating a further gap in the research, especially since grounded theory can enhance the understanding of VFR by providing “a thorough theoretical explanation of social phenomena under study” (Corbin & Strauss, 1990, p. 5). The post-positivist approach of the article helped guide the appropriate research methodology as well as helping to guide contact with potential study participants. Objectivity was ensured through independent reviews of the results by the authors and by comparing interview results with literature findings, as recommended by a grounded theory approach (Corbin & Strauss, 1990).

### ***3.1 Population and Sample***

The population consisted of expatriate residents in Dubai who had hosted a friend or relative. It is important to note that due to varying definitions of VFR and VFR travellers' self-classification dilemma, the population was left open to any resident who had a friend or relative visit Dubai during their residency. This was due to the fact that various other studies have found that respondents may, possibly incorrectly, not consider a traveller as a VFR traveller if they do not stay with the host (Morrison et al., 2000). Shani and Uriely (2012) set similar parameters for their population requirements of local city residents.

Following the recommendations of Creswell (2009), a purposefully selected sample was utilised to ensure that the individuals chosen would provide maximum insight into the impact of VFR travellers on hosts. A purposeful sample was also required to ensure that the participants had hosted a VFR traveller while in Dubai. The selection process was conducted in such a way as to provide a wide range of various parameters, such as time in Dubai, occupation, and frequency of VFR visitation to ensure an as-well-rounded perspective as possible.

### ***3.2 Data Measurement and Collection***

A total of 10 interviews were conducted over a period of 1 month. Saturation was reached by the ninth interview with the additional interview being conducted to confirm saturation. Originally, five questions were developed and piloted with members of faculty at a Dubai based university. No changes were made after the pilot's completion. After conducting the initial four interviews, a sixth question was added, based upon the responses from participants (Corbin & Strauss, 1990). This

sixth question was asked to all participants, but formalised in the fifth interview. The interviews asked participants the following questions:

1. Describe your experiences with your VFR visitor.
2. Why did you partake in these experiences?
3. Can you describe if you have gained anything from participating in these experiences?
4. How has participation in these activities affected your general knowledge?
5. What knowledge have you gained about Dubai from participating in these activities?
6. Can you describe if there has been any difference between what you learnt and how you learnt it before and after your visitor?

These questions were designed to elicit maximum insight into how VFR travellers influence their hosts learning capabilities. All questions attempted to entice the participant to explain the occurrence as well as trying to allow the researcher to estimate “. . .how the actors respond to changing conditions and to the consequences of their actions” now and in the future (Corbin & Strauss, 1990, p. 5). This is best seen in question six, which targeted this information more directly. These questions were supported by demographic questions pertaining to the participant’s expenditure with VFR travellers, age, gender, education, and time in Dubai. Participants were purposefully selected in order to ensure that those interviewed have had a visitor in Dubai within the last year and would offer maximum insight into the topic (Creswell, 2009). Potential participants were called and requested to partake in the interview.

Interviews, averaging 40 minutes each, were conducted at locations of the participant’s choosing. Transcriptions began as soon as the interview was completed to ensure as much detail as possible was included and to help guide later interviews (Corbin & Strauss, 1990).

### **3.3 Data Analysis**

The interviews were recorded and then transcribed verbatim, and, under the canons of grounded theory, the transcriptions were analysed through the use of emerging themes and themes from the literature (Creswell, 2009). Transcriptions were themed by searching for specific words, phrases, or sentiments that were discussed. Every time a new theme was found or an old theme emerged, they were counted to help find the most commonly discussed themes. Due to the limited research pertaining to the influence on VFR travel on hosts, current literature provided few themes and relatively little guidance. Following the requirements of grounded research, interviews, transcriptions and analyses were conducted simultaneously so later interviews could be adjusted to provide more insight (Corbin & Strauss, 1990). Transcriptions were re-read multiple times in an attempt to entice core themes from the interviews, central to the study’s purpose (Corbin & Strauss, 1990).

## 4 Findings

### 4.1 Participants

A total of 10 interviews were conducted with expatriates residing in Dubai, each interview averaging 40 minutes. The number of years living in Dubai ranged from 1 year to over 25 years in Dubai and ages ranged from 21 to 60. The most common nationality was British, with 5 out of the 10 coming from areas within the UK. The remaining five participants came from Iran, Egypt, Australia, New Zealand, and Sri Lanka. Eight of the participants were male, while two were female. All participants catered towards visiting relatives and only one did not cater to visiting friends. Hosts' additional expenditure with their VFR traveller ranged from the most common value of Dhs 100 per person per day up to Dhs 600. VFR travellers most commonly stayed for around 1 week, although the total range was 3–100 days.

### 4.2 Concept Map

The following Fig. 1 provides a concept map developed based on the results of the face-to-face interviews to explain the nature of VFR travellers' influence over the expat-host.

'Duty as Host' would appear to be the fundamental factor encouraging hosts' participation in and learning about the destination. Hosts perceived an element of 'duty' to their visitor to spend time with them and to provide information to them in the form of Participatory and Guide drivers. These drivers gave the expat-host the

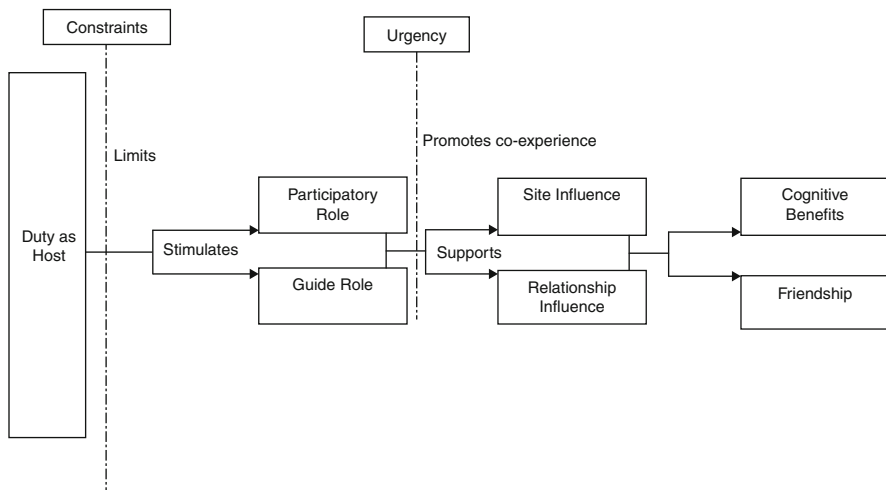


Fig. 1 VFR traveller influence concept map

desire to experience Dubai's attractions with their visitor, or made the expat-host feel obliged to guide their visitor around Dubai. There were, however, a number of constraints which expat-hosts had to contend with that affected the effectiveness of the drivers; work commitments, who was visiting, etc. The drivers themselves governed the hosts' desire to visit sites with their visitors by creating a feeling of urgency to visit sites soon. The site and the visitor would then jointly influence the expat-host. The site would offer enjoying, new, and unique experiences, while the visitor would influence the expat-hosts' attendance and learning just by being present, through a desire to spend time with friends and family.

Having then experienced the site, the expat-host then benefited in a cognitive and friendship manner. Cognitively, the expat-host became more aware of the destination, improved their understanding, learnt more about the site, and had their previous thoughts challenged. From a friendship perspective, expat-hosts felt their relationship with their visitor improved, while also feeling prideful in Dubai after seeing their visitors' reactions.

### 4.3 Themes

A total of nine themes arose out of the interviews. When describing their thoughts, participants often mentioned a variety of activities the hosts partook in with their visitor. Of these activities, restaurants were the most popular followed by hotels, the desert, shopping, Burj Khalifah, and other sources of entertainment.

#### 4.3.1 Duty as host

Participants described the feeling of 'Duty' as a host as an implied requirement. Expats believed that they should behave in a certain manner because they were hosting friends or relatives. This was often expressed in the sense of a requirement "... *I have to go and see them...*" (PII, Q5). In some cases, participants described 'duty' more explicitly "... *you are duty-bound, to some degree to entertain them...you feel honour-bound to do something with them...*" (PV, Q2). Participant V continued to describe how duty sometimes expanded to an element of self-suffering to ensure the visitor's comfort "... *[Friends] want a barbeque. I find that a bit tiring! But...because they're on holiday, you don't want to say no to them...*" (Q2). Participant VIII expanded on this "... *[Husband] just doesn't feel as relaxed and he always feels...he shouldn't leave them...he should be the last person to bed. He won't leave them...*" (Q5). This element of 'duty' occurred when participants discussed accommodating visitors, planning activities, and financing visits. In some cases, learning about the destination was seen as an element of the expat-hosts' duty; expat-hosts should learn about e.g., various religious events so they could inform their visitor accordingly "... *So when they [visitors] come I can give them a lot of information because I know it. So an outlet to share my knowledge.*" (PIV,



Q5). Interestingly, the theme of 'duty' also extended to the hosts' duty to their destination, with participants speaking of a desire, or duty, to protect the destination from criticism "*So you become defensive and supportive of you. . . your environment and proud. . . in a way.*" (PX, Q6).

### 4.3.2 Constraints

This theme included, but was not limited to factors such as: the time of year the visitors came; work commitments; previous visitation; the nature of the visitor—parents, siblings, friends etc.; duration of stay; how long the host has lived in Dubai; the reason for travel; the visitors' ages; and budgets of the host and visitor. In some cases, this was directed specifically at limiting the hosts' involvement and learning opportunities. When asked why they did not visit Burj Khalifah with their visitor, Participant II responded "*. . . weekdays. . . I didn't have the opportunity. . . obviously work is work*" and described another situation in which "[my mother]. . . *came here for a very specific event and her time frame was too short.*" (PII, Q5).

### 4.3.3 Participatory

Participants often cited various participatory factors which influenced their attendance to and interest in various activities. Chief among these factors was enjoyment, which was often the deciding factor determining whether the host would attend the activity with the visitor or not, and whether they would recommend it to their visitor. Participants also explained their desire to attend certain activities or sites was out of a drive to be involved with their friends and experience attractions with them. In some cases, participants' desire to experience a site with their visitor would encourage them to visit a site repeatedly or even wait for their visitor before experiencing it "*. . . for example the trip to the top of the Burj (Khalifah), we purposefully held back on that. We could have done it before, but we thought "No, we'll wait for the visitors to come"*" (PVII, Q2).

### 4.3.4 Guide

Participants often felt obliged to act as a guide and to show off the destination to their visitors "*When they [participant's family] were here, I was like a team leader of a small group of people to show them around the city and show them the touristic aspects*" (PI Q1). In some cases, participants used this opportunity to show their visitor how they lived in Dubai and what their life was like. This desire or duty to guide their visitor around was not solely for the visitors' benefit. In some situations, this provided the expat-host with a method to validate and convince their visitor that their Dubai life was justified. The expat-hosts' role as a tour guide was sometimes

alluded to, other times, it was categorically stated. This did not mean that the expat-host had to be with them at sites, but that they could guide them remotely

We know the geography of the country and we know the geography of Dubai and, you know, guests don't know, so they need a guide, so it's basically that's key role as... as a guide, not only a geographical guide but as a cultural guide as well viewing aspects of the history and culture that the location presents... If say for example we were working during the week, Sunday through to Thursday... one, the previous night we would sit and say 'Well what would you like to do tomorrow?' And they'd say 'Oh well we heard the Creek was nice.' And so then I'd work out where to go to the Creek and how to catch the abra and how much to pay... (PIV, Q2)

### 4.3.5 Urgency

Varying degrees of urgency dictated the number of times expat-hosts would visit a site, when they would visit, and whether they would visit alone or wait for a visitor. That is, some expat-hosts would not visit a site due to a lack of 'urgency'. However, when a visitor was staying, the expat-host felt the visitors' 'urgency' to visit the site now. In terms of factors at the site, the expat-host was influenced by the site itself or through their role as a friend. At the site, the variety of activities offered, the unique, new, and different experiences, all helped the expat-host to learn about the site and Dubai, and encouraged them to visit the site with their visitor. Participant VI explained

I think it's really... again we, we're spoilt a lot here because there are so many attractions to see... that we're... sometimes because it's on your doorstep you don't go. I'll go there at some stage... well you actually, when you've got people over, you make the effort to go and do it so, that's been done. (Q1)

### 4.3.6 Site Influence

Due to the presence of their visitor, some expat-hosts were encouraged to visit sites for the first time or waited to visit a site so they could do so with their visitor. Participants frequently referred to factors that would influence participants' decision to return to sites either from a host perspective or from a visitor perspective; that is, what factors would influence the visitors' desire to return to a site again or encourage the host to return with or without their visitor. Value, enjoyment and the provision of memorable experiences were popular drivers "... I've done that [afternoon tea at Burj al Arab] 3 times because that really was a quite memorable occasion but with 3 different sets of visitors. So each time, yeah, you wouldn't necessarily go just as a family..." (PVII, Q3). On many occasions, the expat-hosts' return to a site was to ensure the comfort of their visitor, especially if the site offered a new experience for their visitor. Expat-hosts' co-experience with visitors' was not entirely for the visitors' benefit. In a number of cases, having a visitor encouraged the expat-host to go to a new site or try a new or different experience. Participant II

explained how they would “...*go to places that I would not normally go to.*” (Q5) when a visitor, in this case their mother, was out.

#### 4.3.7 Relationship Influence

Participants often wanted to be a guide, visit sites, or experience new things with their visitor because they wanted to spend more time with them and they wanted to see their visitor's reaction to Dubai and the various sites “*So I want to go and show them and then I want to see their expressions, how they feel about... the idea of visiting the largest mall [in the world]*” (PIX, Q2). Participants described their thoughtfulness on a number of occasions whereby they would pre-plan trips based upon what they knew their visitor liked or did not like to do. This would sometimes encourage the expat-host to pursue activities repeatedly for the enjoyment of their visitor. Participant VII described how they would often return to sites they had previously visited in order to keep their visitor happy “...*we want you to experience this for the first time. We thought it was amazing, we think you will too.*” (PVII, Q3).

#### 4.3.8 Cognitive Benefits

In a cognitive perspective, participants described situations in which they felt they had learnt more, gained more understanding and awareness, had their interest stimulated, and were offered fresh perspectives from visiting sites with their visitor. Participants often described situations in which information about particular topics was obtained, ranging from knowledge about their visitor, to knowledge about the destination “...*so I just find out for example, my mum doesn't like... sushi for example...*” (PI, Q5). Participants described, both directly and indirectly, various situations in which information was obtained. Participants often referred to this in the sense of learning or allowing them to learn more about various factors such as Dubai as a whole, companies and their marketing strategies, people's habits (PI, Q5), general trivia (PV, Q4), or general information about sites in Dubai (PVII, Q4). In most cases this theme was much more general and direct with participants describing how they had learnt or had been given the opportunity to learn. When Participant V was asked if he/she had been encouraged to visit sites in Dubai because of their traveller, they commented, “*Have I learnt anything by going with them? Maybe, yeah, well not maybe, yes actually. So it's yes, what it is I don't know, but I'm sure it is.*” (Q5). Participant III added “...*So it's just about learning...learning more about the, you know, the tourist spots or the experiences...*” (Q5). When asked how this learning occurred, Participant III explained “...*because I'm called upon to explain...*” (Q5). In a similar light, Participant VII felt that “...*you gather the...that information as you go along...but I'm not hungry for general knowledge...*” (Q4), seeming to imply that hosts may subconsciously learn as a result of their visitors' trip. In terms of awareness of

Dubai, participants specifically referred to information and insights gained about Dubai and the region “. . .my general knowledge of the area has. . . improved. . .I have a much deeper appreciation and admiration for. . .er. . .local people, for Emiratis and for their culture.” (PIII, Q4). Other participants were less specific “. . .getting to know about the country and erm. . .why certain things happen at certain times. . .” (PVI, Q3). In many cases, this theme emerged in line with providing the visitors with information, that is, awareness about the destination was obtained while the host was attempting to find information to pass on to the visitor as a part of their duty.

### 4.3.9 Friendship

The development and maintenance of friendships was cited by a number of participants as an additional benefit they derived from hosting their friends and family. This gave friendship the position of being a driver, an obligatory requirement, and a benefit which expat-hosts encountered. Participant V particularly mentioned that “. . .closer friendships. . .” (Q3) were something they gained from hosting their visitors. In some cases, this relationship amounted to a better understanding of how the expat-hosts’ visitors think and perceive different scenarios, in a more psychological manner.

## 5 Discussion

### 5.1 *The Influence*

Participants in the first stage of the study offered a total of nine themes to describe how visiting VFR travellers impacted them and their knowledge of Dubai.

#### 5.1.1 Duty as Host

Throughout the interviews, participants referred to an element of duty as a host and, in a smaller number of cases, as a resident. Participants spoke of an implied contract in which they were ‘required’ to see their visitor, participate in activities with them, let them do what they wanted to do, and in some cases, not even leave them when the host had to rest for an early day. This perspective of duty was also found by Shani and Uriely (2012) “Many of the interviewees said that the need to comply with the requirement of being a ‘good host’ generates mental stress. . .” (p. 429). Like in the interviews, Shani and Uriely (2012) found that hosts did feel a requirement to attend to their visitors, provide accommodation, and spend time with them. The interviews added to this dimension in the respect that participants linked their

'duty' to reasons why they conducted research, answered the visitors' questions, and participated in activities, all of which then resulted in some form of learning. Participants explained numerous situations in which they felt required to conduct research to answer the visitors' questions, partake in activities with their visitor, ensure the visitors' satisfaction and enjoyment, and fulfil the visitors' desires to go somewhere or do something. In the interviews, 'duty' appeared to be a driver to partake in activities with only factors such as a great dislike for the activity or work requirements preventing attendance. Shani and Uriely (2012) on the other hand, found attendance for many individuals was influenced by a desire to be a tourist at home and to feel like a tourist without leaving home. Duty was not such an obvious component in this light, as it was in the interviews.

In a fewer number of cases, participants described their duty to the destination in a sense of defending it from criticism and defending the way of life in Dubai, while the literature often took the perspective of regional patriotism. In Shani and Uriely's case, the focus here tended to be on pride in showing the destination to the visitor, while in the case of the interviews, it appeared to be more defensive down the line of protection and showing support for the destination. This difference could occur due to the variation between resident and expat; Shani and Uriely's residents may feel more linked to the destination, and therefore feel more proud, whereas the respondents in this study felt a need to defend their host country.

### 5.1.2 Constraints

The 'constraints' provide a useful indicator of what situational and demographic factors prevent or promote the travellers' influence over the host. Participants described that the length of time they had lived in the Middle East, and Dubai specifically, really limited, or enhanced, how much they learnt from their visitor. Participant V has been in Dubai for 25 years and stated that they avoid attending cultural and historical sites with their visitors because they have seen them all before and, in many cases, seen the real e.g., cultural display as opposed to a staged one at a specific site. On the other hand, Participant III has been in Dubai for less than 2 years and found visitors beneficial in improving their knowledge about Dubai and the region. Participants also referred to factors which influenced their involvement, such as work commitments, the length of time their visitor was in Dubai, whether they were a friend or relative, expenses, and the time of year visitors came to Dubai. In the literature related expenses have been mentioned before in this light (McKercher, 1996), although this mostly took the form of awareness of additional expenditures. This focus was also reported by Shani and Uriely (2012) where they found that "...HFR [Hosting Friends and Relatives] involves substantial expenditures..." (p. 429). In other cases, Shani and Uriely (2012), whose research specifically focussed on how hosts are impacted by their VFR visitor, found constraints in the sense of factors impacting the host, rather than limiting their ability to learn. Impacts such as those considered spatial, economic, socio-psychological, or physical were all found to affect the hosts, mostly through the

requirements to make adjustments to routines, behaviour, and spending habits, to name a few. These types of impacts did not occur in the interviews, which is most likely due to the differing focus of the studies. However, this difference does suggest a potential discrepancy between hosts' perceptions of what affects them and their perceptions about what affects their ability to interact and gain knowledge. This potentially makes the general nature of VFR impacts more complicated that is, the visitors' presence results in one set of impacts, while their influence results in another set. While this case is possible, it is also important to consider the potential cultural and geographical differences that may be present between the two studies which may influence the results.

### 5.1.3 Cognitive Benefits

Learning, the key focus of the study, appears to be prominent amongst expat-hosts as a result of their visitors. To quote Participant V "*Have I learnt anything by going with them? . . . yes actually. . . what it is I don't know, but I'm sure [I have]. . .*" (Q5). This was a fairly common reflection amongst participants. Further to the elusive nature of the expat-hosts' learning, this dimension seemed to occur as a by-product, with the original motive being the hosts' duty to the visitor. Participants explained that they were not necessarily seeking the knowledge out for the sake of learning but either absorbed the knowledge as a result of partaking in activities with their visitors or conducting research on what to do with the visitors. Expat-hosts did, therefore, appear to learn about a number of topics, although they were possibly unaware or not necessarily seeking a learning experience. What hosts learned varied between the participants. Participants described learning about various destinations, their visitors and themselves, among other topics. Interestingly, some hosts described a much more cognitive approach in this case, with them learning about how both themselves and their visitors behave, think and perceive different situations. This dimension of learning has not previously occurred in the literature, except in a possible implied sense. Morrison et al. (2000) and Shani and Uriely (2012) described situations in which the host became "... a tourist in one's own backyard" (Young et al., 2006, p. 498). While neither of these studies explicitly mentioned any related learning, the hosts' involvement in touristic activities, making an apparent move from 'resident' to 'tourist', could demonstrate the potential to learn, as reported in this study.

As a result of hosting visitors, the interview participants explained that they learnt about Dubai as a destination, gaining knowledge about the activities that can be done, requirements such as age restrictions, and considerations such as what time of the day or year is best to visit certain attractions. This was rarely linked to historical or cultural information, but instead tied to practical knowledge about living in Dubai. Again, only Shani and Uriely (2012) have conducted any form of

research that relates to this. They found that, similarly, hosts "...increase their familiarity with their outdoor living surroundings. . ." (p. 428) although there was a tendency to focus on new sites, sites that were less frequented, or were most common with new residents. The specifics of this theme therefore differed between the interviews and the literature. Participants in the interviews gained insights about sites including those regularly visited and occurred regardless of how long they had lived in Dubai or the UAE. These differences could, again, come down to the difference between nationals and expatriates, the city of residence notwithstanding.

## 5.2 *How the Influence Occurs*

Now that the nature of the influence has been established, it is important to consider what factors affect the facilitation of influence.

At the end of Milgram's (1965) article, he described the sinister nature of what he had discovered in relation to individual's malevolence in the face of authority. Individuals' 'duty' to someone who they perceived to be in authority, regardless of their credibility, encouraged them to undertake actions that no one, not even Milgram, imagined would be so extreme "...the technical difficulties of finding a workable experimental procedure. . .indicated that subjects would obey authority to a greater extent than we had supposed." (p. 61). As it has been previously described from the interviews and VFR literature, 'duty' took the form of the hosts' feeling of a requirement to spend time with the visitor, entertain them, and defend the destination. Concerning the role it played regarding influence, it appears that, as shown in Fig. 1, 'duty' was felt to be the underlying driver behind the expat-hosts' involvement with visitors. 'duty' in this study, can be likened to Milgram's definition of obedience "A subject who complies with the entire series of experimental commands . . ." (Milgram, 1965, p. 59). In relation to the expat-host's 'duty', it appeared that when the host was encouraged to do something with or for the visitor, they behaved in an obedient manner. An example can be drawn from Aramberri's (2001) descriptions of various situations in which the host has a duty to protect their visitor. In this light, the hosts' behaviour is governed by their requirement to protect their visitor. That is, the host will do, essentially, what the visitor wants in order to protect them (Aramberri, 2001), the destination (Shani & Uriely, 2012), and entertain the visitor (PV, Q2).

Participants alluded to learning through participation, in turn, derived from 'duty'. In Milgram's (1963, 1965) studies, he found that participants had a tendency to overestimate their resistance to influence and, as such, participants' admittance of influence through duty, or any other theme for that matter, may have been under-reported.

## 6 Conclusion

### 6.1 *The Study*

This study has implications for both academia and industry. In terms of academia, the influence of VFR travellers on their hosts has yet to be understood or even considered. This study has therefore added to the understanding of VFR and its true impacts upon a destination. Additionally, the impact upon expats has received even less focus which should be remedied considering the growing number of expats globally. For industry, a better understanding of the VFR market and the impact upon the host can help businesses to create more appropriate products. By understanding how much tourists spend, where they spend and how they affect the host, businesses will be able to adjust their products and marketing campaigns to appeal to the host prior to the VFR traveller's arrival to encourage visitation. Additionally, businesses could consider marketing to potential VFR travellers in order to encourage hosts to patronise the establishment. While the latter factor is a non-direct manner of appealing to the local expat market, it has the added benefit of being a new approach, giving businesses who adopt it a potentially lucrative first-mover advantage.

For businesses whose goal is to promote education, learning and cultural understanding, this study will help to provide an alternative method of attracting and educating the local expat population. For example, a product could be created that offers discounts or value-added services to hosts if they are accompanied by their visitor, or vice versa.

Alternatively, since VFR travellers do seem to have an impact upon their hosts, marketing to the traveller can encourage the hosts' patronage of the establishment. By encouraging expat-hosts' to invite VFR travellers, companies can create a more productive and knowledgeable workforce. Their international employees can gain a greater perspective on life, global events and specific developments that can be used in business to facilitate more applicable business interactions. Additionally, it appears that hosting VFR travellers can generate positive results for individuals as they suffer less from culture shock (Oberg, 1960). This in turn can allow individuals to become better, more confident workers.

A qualitative study was conducted with the aim of discovering the extent to which VFR travellers influence their expat-host to learn about the local destination. In order to gain maximum insight into this untouched area, three objectives were developed to gain an understanding of VFR travel, to gain insight into the factors that influence expat-hosts, and to improve the understanding of how VFR travel affects expat-host learning.

The first objective demonstrated that VFR travel is an under-researched and under-represented area in both academia and industry. Even amongst the relatively limited research in existence, there is dispute amongst researchers, particularly in light of what actually constitutes a VFR traveller. The actual focus of this study, expat-host learning, has never been considered previously therefore offering a



potentially wide gap in the literature. Indeed, only one previous paper (Shani & Uriely, 2012) considered the host in the research of VFR travel. Previously, all research focussed on the traveller, mostly ignoring the other half of VFR travel.

By using qualitative face-to-face interviews, it was possible to explore how VFR travellers could influence the expat-host to learn, as specified in the second and third objectives. A total of 10 interviews were conducted with expat residents of Dubai over a 2 month period. There were at least six different nationalities, with British being the most frequent. The results of these interviews indicated that expatriate hosts appear to be influenced by their traveller because of a feeling of duty. That is, the expat-host feels duty-bound to protect, escort, care for, and inform their visitor (Aramberri, 2001; Milgram, 1963; Shani & Uriely, 2012). This element of duty then appeared to stimulate and create certain drivers that encouraged the expat-host to participate in activities with their visitor, depending on the impact of certain constraints upon the expat-host. These drivers included a "Participatory role" and a "Guide role", encouraging expat-hosts to participate in activities with their visitor and acting as a guide for their visitor, while at the site or remotely. After building a sense of urgency in the expat-host to visit sites again or for the first time, the expat-host was additionally impacted by the site and their relationship with their visitor. This influence chain then resulted in cognitive benefits of improved learning, understanding, and awareness, and an improved relationship with the visitor. The interviewees seemed to imply that it was through 'duty' that they were exposed to situations which prompted learning or were actively encouraged to learn. For businesses, the promotion of this 'duty' could actively encourage expat-hosts to visit or use the business repeatedly with their visitor.

## 6.2 *Limitations*

The environment in which this study was conducted may limit this study's applicability to other destinations. Dubai, as with many Middle Eastern countries, has a strong family-focussed culture, is located in a region perceived as volatile, and has proved very popular with tourists (see Attwood, 2012). Specific to Dubai and the UAE is the somewhat secluded nature of the local population from expatriates, creating an almost mystical perception of local Emiratis in the eyes of tourists and expats. These factors may combine and may greatly influence the hosts' involvement in certain activities and subsequent learning. The destination may, therefore, play a significant role in the relationship between the VFR traveller and the hosts' perception of gained knowledge.

The small and diverse sample size, while providing a range of ideas does raise questions about the extent to which this research can be applied. Although saturation was reached, a more extensive study would be prudent to ensure the nature of the relationship between expat-hosts and VFR travellers is fully understood.

### 6.3 Future Research

Based on the results of this study, the VFR field could benefit from a greater qualitative focus on the ways in which VFR travellers influence their host. This study demonstrated that hosts did learn as a result of their travellers, while the exact nature of why they learnt remains unclear. Further qualitative studies could elaborate on this area.

Additional research could utilise a quantitative methodology to explore the extent to which hosts, and particularly, expat-hosts learn about the destination in which they live. While this study has laid the groundwork for a basic understanding, a more extensive and generalizable study would help to better explore the impact VFR travellers have upon host learning.

Future studies should be conducted in regions other than the Middle East. The only studies to consider the impact upon the host from VFR travellers, this study and Shani and Uriely's (2012) paper, both used Middle Eastern populations. Due to various circumstances, this could significantly influence the results of these studies. An international focus will help to accurately establish the holistic relationship between VFR traveller and host.

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# Mediterranean Nutrition and Hospitality: A Must for Greek Tourism Development?—The Case of the Region of Thessaly

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**Abstract** This paper describes and assesses the key elements, the main characteristics of tourism in Thessaly, especially in view of the tourists culinary approach. The purpose of the study is to present the way in which the local products of Thessaly are been exploited, from hotels and guesthouses to attract more and more tourists. Through mapping of theories of international experience and the presentation of case studies, proposals and suggestions will be made in order to improve the competitiveness of tourism through gastronomy. Whichever occurring results can be generalized and used to benefit the local community and the development of tourism.

**Keywords** Culinary tourism • Tourism sociology • Local economy • Gastronomy • Local products

**JEL Classification** R1 • R11 • Q13

## 1 Introduction

Greece is one of the most popular destinations for tourists around the world. Nearly 20 million people from around the world visited Greece in 2014. Tourism contributes significantly to the growth of GDP and increased revenues of Greek state after a 9.5 % of the Gross National Product (Elstat, 2014). The competitive advantages of Greece in the development of tourism are cultural heritage, natural beauty, geographical diversity that reinforce the image of Greece as a tourist destination and a tourism market with excellent investment opportunities (webpage accessed on

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Greece: The true experience Hellenic Ministry of Tourism advertisement (See relevant webpage [www.visitgreece.gr](http://www.visitgreece.gr))

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13/04/2015 <http://www.investingreece.gov.gr/default.asp?pid=36&sectorID=37&la=2>).

Hence the importance of tourism to the Greek economy is huge and can form the basis for dealing with the economic crisis (Ikkos, 2015).

## 2 Literature Review

According to Aspridis and Kyriakou (2012), World Tourism Organization (U.N.W. T.O., 1994) suggests that tourism “includes the activities of people travelling and staying in destinations and areas other than those that are their usual environment (such as their place of residence) and for a period not exceeding 1 year (excluding holidays) to recreation, satisfaction of their professional needs and more. The same is referred to the definition of the International Academy of Tourism (AIT—Monte Carlo) which considers tourism as all human activities and movements, which are caused by externalizing and making the desire for escape. Desire which is inactive in every person in varying degrees and in varying tension.

As a hotel we mean “a building or group of buildings built or configured to provide accommodation or food to the public for a fee, which is organized on a business basis and classified into categories depending on the quality of construction, amenities and ancillary services offers (conference rooms, sports facilities, nightlife, shops and others)”. Hotel chain is “a series of such operations in one or more countries belonging to the same company and managed by it”. Finally, as hotel employee we mean “the employee of a hotel, responsible for the proper operation, proper services, internal order and other spaces of a hotel” (Babinotis, 2002, in Aspridis et al. 2013).

In relevant bibliography (Sdrolias, Binioris, et al., 2014; Sdrolias, Kakkos, et al., 2014) a number of different forms of tourism is described. In this text we will deal with gastronomic tourism and more specifically with the local traditional recipes and local products. Local communities in the full model development, cultivate, prepare, package and then sell to tourists, among others, local gastronomy and local—traditional products (preferably organic), which are the agrotouristic package. In this way they try to meet the needs of tourists for fresh, local, traditional products, which resemble homemade flavors. In this framework, local products are being marketed and promoted, particularly those identified as Protected Designation of Origin (POP), Protected Designation of Superior Origin (OPAP), the self-produced and the organic products. Agrotourism is the link between agriculture and tourism and represents sustainable tourism development. These products contribute to the formation of tourist consumer awareness, the tourist destination becomes more dynamic and eponymous and finally it stimulates the local economy (Askeli, 2008; Palisidis, n.d.).

Moira and Mylonopoulos (n.d.) mentioned that “cultural tourism is defined as travel by dominant motives with its different activities and experiences on culture, such as participation in festivals and cultural events acquainted with the history and tradition of areas, places and countries, visiting areas with traditionally built

environment, visiting cultural monuments and museums, getting to know the local customs and local gastronomy. As a culinary tourism we mean the form of holiday in an alternative way in which the culture of the local cuisine dominates ([http://www.aegeancuisine.gr/content/.../Gastronomikos\\_Tourismos.pdf](http://www.aegeancuisine.gr/content/.../Gastronomikos_Tourismos.pdf); <http://www.ekpizo.gr/sites/default/files/topika%20proionta.doc> accessed on 12/04/2015).

In prepublication of the Act driver for Alternative Tourism (xx: 9) gastronomic tourism is referred to as “the form of tourism that encourages the participation of visitor experiences associated with the local cuisine and highlight the particular gastronomic identity of a particular area.” The same driver reported that the main actions that belong to the culinary tourism are the discrete integration of the local cuisine on offer delicacies, the creation and/or diffusion of culinary and wine-tourism trails, tastings and more.

### **3 Tourism in the Region of Thessaly**

#### ***3.1 The Contribution of Tourism to the Local Economy***

The policy of tourism development was originally based in the specialized and decentralized planning of tourism development with emphasis on the balance between the economy, society and environment. In this context, structured tourism development projects are being promoted at local level which is designed to the interface function of the different sectors of the economy with tourism. The planned development and switching to a specialized and often qualitative demand are the main causes of the rapid development of special and alternative forms of tourism for the past 20 years (Tsartas, 2006, [http://www.morax.gr/article\\_show.php?article\\_id=962](http://www.morax.gr/article_show.php?article_id=962)).

In this context, it is highlighted the particularity and the importance of the tourist region as a destination and there has been a phenomenal growth of alternative forms of tourism locally, a positive fact for regional development and the need to have a local Marketing program (Kokkosis & Tsartas, 2001)

Furthermore, because of tourism for local communities complete the agritourism package using it even in gastronomy. These actions stimulate the marketing of their agricultural income and the local economy and create thematic and incentive activities. This way, a tourism and consumer awareness of the traveler is being cultivated, so the tourist destination can be multifarious, competitive, dynamic, quality, eponymous (Askeli, 2008).

#### ***3.2 Local Products of Thessaly***

The Region of Thessaly is a geographical region of Greece and now includes the Regional Units of Larissa, Trikala, Karditsa, Magnesia and the Sporades (Annex 1).

The total area of Thessaly region is 14,036 km<sup>2</sup> with a population of 744.037 inhabitants. The terrain is mountainous, hilly and lowland and its boundaries include the plain of Thessaly, the largest economy in the wider region is mostly rural, although there are major industries embedded in Industrial Areas of Larissa and Volos (Annex 1)<sup>1</sup>.

In the gastronomy of Karditsa one can distinguish pies with many films, the galotyri, the tsalafouti, wine and especially the “Black Mesenikola”, a separate local product and raki. In the gastronomy of Larissa one can distinguish nivato and sour cheese (xinotiri), the cabbage croquettes and the sheep kebab skewer or hull. On the coast of Larissa, the grilled fresh sardines. Also, there is raki and wine. In the region of Magnesia one can distinguish the olives of Pelion, apples, pears and cherries, named ecological wines of Alonnisos, plums of Skopelos and all kinds of fruits are grown here. Finally, in Trikala the dominant position is held by feta cheese and other products based on milk, such as yogurt, sour milk, butter and cheese. Also, livestock production (Hellenic Chamber of Hotels, xx)

The importance of food emerges and from the data of the World Tourism Organization, for 44 % of travelers around the world eating is one of the three selection criteria for the destination that will visit (Moira & Mylonopoulos, n.d.).

The importance of local products has been highlighted in a study of Greek Tourism Organization, which stated that the creation of a network between different regions which have cooperatives and companies offering regional cuisine and products (2003) (Annex 2).

## 4 Case Studies

The more intensive use of local products was launched in September 2012 with the opening of accession of sufficient number of hotels in [www.greekbreakfast.gr](http://www.greekbreakfast.gr) program and use of this website. Into the first 51 hotels that have adopted the Greek breakfast, 4 hotels were from the Region of Thessaly.

In Thessaly there is considerable diversity in both the available local products and the development of tourism and hotel infrastructure. Therefore four main tourist poles can be distinguished: (a) Pelion (b) Kissavos (c) Lake Plastiras (d) Pindos/Meteora with more developed the one of Pelion. The case studies that will be examined nevertheless relate to two companies of mount Kissavos, pole deemed by the less developed tourist wave to further indicate how local hotel businesses which are based on local suppliers can differentiate from the competition. In addition, these case studies will be used to raise awareness of standardized local products and how this can become an emerging spiral for which the visitor

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<sup>1</sup> According to Greek Statistics Authority for the last general census, on webpage <http://www.statistics.gr/portal/page/portal/ESYE/PAGE-census2011>

will speak and after the experience, and that can ‘follow’ through the sales of such products worldwide.

The hotel Dohos ([www.dohoshotel.gr](http://www.dohoshotel.gr)) is small scale-run hotel of 10 rooms built in Karitsa village of mount Kissavos overlooking the Aegean Sea. Its name comes from the Greek word receptive and receiver, making it synonymous with hospitality. The accommodation offers the tranquility of nature in a very special and private environment, combining the rich forest of Kissavos with amazing views of the Aegean Sea because of its location on the slope including swimming in the nearby ‘private’ coves. Breakfast is made of traditional Greek products from local producers, while the ‘a la carte’ food menu combines traditional local products, fresh vegetables and herbs from the garden of the hotel with passion and art of an experienced chef. This hotel company also participates in the “Greek Breakfast” scheme of the Hellenic Chamber of Hotels ([www.greekbreakfast.gr](http://www.greekbreakfast.gr)), which connects and develops the cultural- gastronomic riches of the country with Greek hotels.

This program is designed and implemented methodically since 2010 with the main purpose to enrich the breakfast offered in Greek hotels, with pure and unique products of the Greek land and traditional local dishes of each region of Greece.

Despite the common basis of Greek breakfast which consists of the main products of the Mediterranean diet as bread, nuts, olive oil, olives, yogurt, honey, cheese, meats, fresh vegetables, beans, pies, pastries and fresh fruit, there is considerable diversity in each area. Therefore, the “Greek Breakfast” contributes to shaping the cultural identity and tourism profile of each place.

In the above mentioned hotel restaurant traditional Greek breakfast it is offered as mentioned with products from local producers. Spices, herbs and vegetables are from its garden. Homemade jams, sweets from cooperatives in the region, fresh sausage, hot frumenty, cheese dairies from the region, fresh eggs from free-range farms, handmade pies and freshly squeezed juices make up the breakfast table one can enjoy, overlooking the Aegean Sea.

At this point we should emphasize the importance of suppliers. Suppliers may be individuals or small local producers, or local businesses more dynamic or local cooperatives. In all cases, however, it should be clarified the need for standardization of products as a means to increase the added value of these products, the hotel business and the benefits due to the recognition and vesting in the minds of tourists, domestic or not.

An example of such local products manufacturing enterprise is the enterprise Yiam ([www.yiam.gr](http://www.yiam.gr)) which resides in the same municipality. The owner began from the kitchen as a small maker of local sweets. Today in the new laboratory, it has reached to manufacture over 200 flavors with pure and original flavors made with much care and attention as sweets, jam with raw sugar, snacks, sauces, pickles, pates, salads, etc., the based on local products. What characterizes all products are the traditional way of making them even with regard to kitchenware, with fresh ingredients and lack any kind of chemical preservatives Made namely as will we have made them at home, kept in glass jars only with pasteurization. They also provide a wide range of organically certified products.



The jars can be found in at least 75 outlets in Greece (selected stores, not supermarkets), in delicatessen abroad, while over the internet are being easily shipped and sold virtually everywhere. Furthermore, they are served excluding local and in some of the best hotels nationwide as in Grande Bretagne in Athens.

In this way the tourist is able to take with him and to obtain the domicile of a piece of the holiday and the beautiful memories that can associatively bear in mind the senses of sight/taste/smell.

## 5 Conclusion

Gastronomy enhances travel experience for every tourists and attracts wealthy tourists seeking an alternative experience in culinary tourism. When gastronomy connected with tourism, the concept has expanded beyond combining good breakfast and food with good wine or other beverages, including participation in cooking classes, buying of local gastronomy production, visiting a local food market, visiting food production areas or wines (for example in cellars or cheese), participation in gastronomic feasts and festivals and conduct of tours. The offer of an affordable and quality cuisine to guests, benefits the destination qualitatively and quantitatively (Association of Greek Tourist Enterprises, 2009; Klein, n.d.).

What is needed is an organized plan and will to support, develop and promote such efforts which can provide a competitive advantage for small and medium tourism enterprises in difficult times, consolidating them in the minds of tourists. The standardization for identification purposes, quality and vesting is considered crucial.

The actions required are for the local cuisine to join in the restaurants of hotels, air companies, establish visits to farming areas, tours, narratives of the history of food, the creation of specialized museums and finally the realization of conferences and lectures for local products (Moirá & Mylonopoulos, n.d.). As a necessity is also considered a website/webpage creation, but also the formation of social networking pages, both in hotels and business of local products that will contribute to the promotion of products and the development of hotel units (Aspridis et al., 2013).

## 6 Epilogue

In this study we sought a brief presentation of the basic characteristics of a form of alternative tourism, that of gastronomy, with the presentation of specific examples.

Tourism is the main driver of economic growth and social welfare and the dynamically developing sector of the national economy. The progress made to date is important but needs more to be done and new investments, especially in human resources.

In any case, taste is something that must be protected since it is a great asset and should be used by each producer and each company separately. The gastronomic tourism should be developed and become a major form of alternative tourism for the Greek reality and contribute to regional development and especially that of Thessaly.

## Annexes

**Annex 1 : Region of Thessaly map**



Annex 1. Region of Thessaly map. Source: <http://www.map-of-greece.co.uk/map-of-thessaly.htm>

**Annex 2 : Local cuisine of Thessaly (indicative list)**

- Sweet Pumpkin Pie
- Langites with sugar or cheese
  - Milk pie
- Egg pies/slices (sweet or salty)
  - Sour Frumenty
- Wheat or white flour Pie
  - Corn Flour Pie
    - Plasto
    - Halva of Farsala
- Sausages of Trikala (*rustic*)
- Mushroom of Meteora

Annex 2. Local cuisine of Thessaly (indicative list). Source: [Hotel Chambers of Greece \(n.d.\)](#)

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### ***Useful Internet Sources***

Hellenic Tourism Organisation ([www.gnto.gov.gr](http://www.gnto.gov.gr), [www.visitgreece.gr](http://www.visitgreece.gr)).

Hellenic Tourism Enterprises Union (<http://sete.gr>).

Hellenic Hotel Chambers ([www.grhotels.gr](http://www.grhotels.gr)).

Union of Tourism and Travel Agencies in Greece ([www.hatta.gr](http://www.hatta.gr)).

Hellenic Professionals Convention Organizers Union ([www.hapco.gr](http://www.hapco.gr)).

Panhellenic Hotel Federation ([www.hhf.gr](http://www.hhf.gr)).

# Challenges in Recreational SCUBA Diving in the Mediterranean Sea: *Posidonia oceanica* Meadows

G. Skoufas, A. Tsirika, E. Kalopesa, and G. Zalidis

**Abstract** *Posidonia oceanica* is an endemic Mediterranean ecosystem which is widely distributed along the Greek coasts, and is considered a biotic index of good water quality. Apart from the ecological interest of *Posidonia* meadows, these habitats can be an attractive pole for recreational SCUBA diving activities. A total of 255 divers (210 males and 45 females) from diving resorts and diving clubs in Sani region (Chalkidiki, North Aegean Sea, Greece) filled in questionnaires. According to the results, only few divers prefer to dive in *Posidonia oceanica* beds, mainly due to the lack of knowledge. *Posidonia* diving appears to be a new challenging destination into the Mediterranean basin and this study examines the possibility to increase the value of *Posidonia* beds as a diving site. The benefits of this are numerous for both the enhancement of the diving industry and the conservation of natural resources. As a general conclusion, the necessity of an appropriate informing and training procedure, through the pre-dive briefing, is underlined.

**Keywords** SCUBA diving • *Posidonia oceanica* • Marine tourism

**JEL Classification** Q5 Environmental Economics

## 1 Introduction

Seagrasses are the dominant species on sandy and muddy bottoms and their communities play an important role in the structure and dynamics of many coastal and estuarine benthic systems (Ros, Romero, Ballesteros, & Gili, 1985). In the

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Mediterranean Sea five marine phanerogam species exist; *Posidonia oceanica*, *Cymodocea nodosa*, *Zostera noltii*, *Zostera marina* and *Halophila stipulacea*. From the above mentioned marine phanerogams, *Posidonia oceanica* is an endemic species with a 'key' role in the Mediterranean Sea. In detail, the significant surface of leaves as well as the expansion with vertical and horizontal rhizomes creates numerous habitats for a variety of algae, invertebrates and vertebrates (Mazzella et al., 1992). In addition, *Posidonia oceanica* is protected both as species and as habitat by EU legislation (Habitat directive), the Bern and Barcelona Conventions and national legislation. The main ecological role of *Posidonia oceanica* meadows include: offering of substrate for the installation of other organisms, oxygen production via photosynthesis, nursery for juveniles of numerous fish species, etc. Additionally, it is important to mention, that the coverage of *Posidonia oceanica* meadows in the Mediterranean basin is about 5 %.

As for all the living organisms, one of the most important factor when studying *Posidonia oceanica*, is to define the vulnerability, thus the probability that a population will be exposed to a stress to which it is sensitive (Zacharias & Gregr, 2005). In this order of idea, it is very important to define the potential threats. The *Posidonia* dominant threats are: mechanical damage from trawling and boat anchoring, coastal development including shoreline hardening, urban and harbour infrastructure, eutrophication, fish farming, invasive species and turbidity. Following the previous remark, scientists recognize the necessity to have an appropriate biomonitoring system, able to evaluate the ecological status of the meadows (Lopez y Royo, Casazza, Pergent-Martini, & Pergent, 2010). Research focuses on protection and sustainable management, habitat restoration and increased public awareness.

The term marine resource refers to products derived from the sea which can be a source of income. These products can be plants or animals and non living elements (e.g. sediment). On the other hand, exploitation of marine resources should not be translated only as organisms' biomass to sale. Actually several studies emphasize on the economic interest of marine life and investigate how wildlife could attract tourists (Brown et al., 2001; Richez, 1992). Tourism is considered a sector of activity of an extreme importance in the Mediterranean basin and in particular, recreational SCUBA diving is an increasingly popular sport worldwide. Importantly, the overwhelming majority of divers do not, as it is widely thought, dive to hunt or collect marine organisms; instead they observe and take photographs or videos of marine life (Goffredo, Piccinetti, & Zaccanti, 2004).

Although recreational SCUBA diving is considered a mild tourist activity with a reduced ecological footprint, it is interesting to investigate, if the recreational SCUBA diving industry constitutes an ecological threat or not, especially when dealing with protected species and habitats, such as *Posidonia oceanica* meadows. First of all, it must be noticed, that the principal interest of SCUBA diving industry is marine wildlife and thus aesthetic values of wildlife and coastal seascape, high biodiversity and increased environmental awareness can contribute to the promotion of tourism activities along the coast and especially recreational SCUBA diving (Badalamenti et al., 2000; Cater & Cater, 2007; Milazzo, Chemello, Badalamenti,

Camarda, & Riggio, 2002). Nowadays diving tourism industry experiences an remarkable increase in destinations in tropical seas, due to the presence of coral reefs. (Oh, Ditton, & Stoll, 2008; Van Treek & Schuhmacher, 1998). However the travel motivations of the tourists to selected marine destinations could vary significantly (Van der Merwe, Slabbert, & Saayman, 2011). Several studies investigate the economic benefits of divers' mobility (Davis & Tisdell, 1996; Vianna, Meekan, Pannell, Marsh, & Meeuwig, 2012) as the recreational SCUBA diving is one of the world's fastest growing sports, with dive travel being the fastest growing aspect of the sport (Dignam, 1990; Tabata, 1992).

The SCUBA diving industry expansion generates an ecological pressure by the users (divers). The recreational SCUBA divers can affect marine wildlife intentionally (taking a piece of coral or a shell as souvenir) and unintentionally as for example through direct contact by fins and other part of their SCUBA equipment, through the entrapment of air bubbles in marine caves or through the resuspension of sediment (Milazzo et al., 2002; Talge, 1990). An additional source of disturbance can be the SCUBA divers themselves as they can affect the natural behavior of marine organisms (Kulbicki, 1998). One of the first attempts to evaluate this pressure by Dixon, Scura, and van't Hof (1993) included the development of a simple model for the relationship between divers density (number of individuals dives) and threshold stress level. This model relates a perceived stress threshold on the marine ecosystem to the intensity of diver uses.

In several cases, Marine Protected Areas (MPA) act as a link between the wildlife conservation and the sustainable marine tourism. Actually, SCUBA diving is now one of the major commercial forms in a MPA (Lloret, Marin, Mario-Guirao, & Carreno, 2006). This compromise became the object of a long riposte and one of the most frequent questions is whether the users have to pay for visiting a MPA. The financial participation of the users (divers) has potential advantages and disadvantages: (a) advantages: generation of regular and predictable income which can constitute a sustainable proportion of operational cost, self-generated income facilitates raising of additional funds or the capital costs of other projects, increased respect from visitors and professionalism among staff, fees can be related directly to management costs and adjusted accordingly, (b) disadvantages: cost of fee collection can exceed revenue raised, especially in rare used sites, effort assigned to fee collection can reduce capacity to protect resources, danger of revenue generation becoming an overriding performance criterion for managers (Green & Donnelly, 2003).

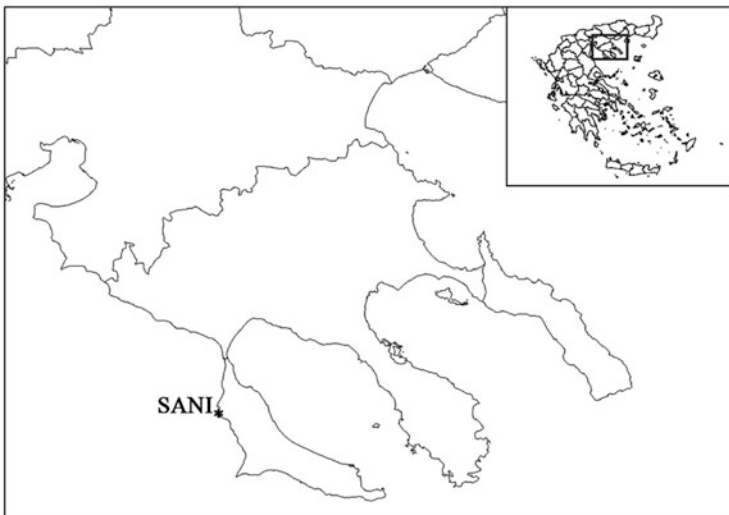
Regarding the Mediterranean Sea, where the dense meadows of *Posidonia oceanica* grow, the MPA grow faster in the west part of the basin (Port Cros, France, Medes island Spain) than the east part (Francour, Harmelin, Pollaerd, & Sartoretto, 2001). Concerning recreational SCUBA diving in Mediterranean MPAs, it is generally not allowed in the central part (e.g. Ustica, Tabarca) or it is subject to individual registration (intermediate zone of Tabarca, all of Medes) involving payment of a fee, or in some cases free access (peripheral zone of Ustica). The precautionary principle in relation to the eventual degradation of the habitats due to diving (coralligene bottom, caves, etc.) has also induced MPA managers to propose

quotas on divers. These quotas can be a source of conflict but are reasonably easily enforced when they apply to dives organized by clubs. The quota can be fixed by limiting the number of clubs that can have access to the zone, and/or the number of divers (Medes, Tabarca). For individual divers such controls are more difficult to be implemented and may involve a procedure of individual authorization that the diver must obtain before diving (Tabarca, Medes). This permit can be attached to the divers buoy, and the number of divers can thus be theoretically regulated over any specific period of time (Medes) (Francour et al., 2001).

Taking into consideration the extended areas that *Posidonia oceanica* beds cover in the Mediterranean basin and their ecological value it is important to promote this significant endemic Mediterranean marine ecosystem as an attractive pole of ecotourism. Using as a target group the Greek recreational SCUBA divers, the current survey focuses in studying whether *Posidonia oceanica* meadows constitute already a preferential diving destination for Greek SCUBA divers.

## 2 Methodology

The current survey took place during 2012. Questionnaires were distributed at diving resorts located in Chalkidiki (North Aegean Sea, Greece). In details, the study took place in Kassandra Peninsula, at Sani region (Fig. 1). The studied area is included in the ecological Network NATURA 2000 as «GR 1270010 Akrotirio Pyrgos—Ormos Kypsas». The underwater landscape of the area is characterized by the presence of a dense *Posidonia oceanica* meadow (priority habitat type 1120\*) at



**Fig. 1** Peninsula of Chalkidiki, North Aegean Sea, Greece



soft substrate. Although the area hosts a rich underwater fauna and flora, it does not constitute a MPA.

The selected area constitutes already a well developed tourist destination with a lot of visitors (about 1,000,000 visitors every summer). Numerous hotels are present in the area, rooms for rent and few large scale resorts. Additionally, a yacht marina is available, for touristic boats. Another thing which is of particular interest for marine tourism industry is the presence of three SCUBA diving centers.

The methodological approach was based on questionnaires which were distributed to tourists that visited SCUBA diving centers. At this point, it is important to define the target groups (visitors) of the SCUBA diving centers or clubs (providers). The providers accept two categories of visitors: (a) the first category which is people with or without diving qualification who intend to attend a training course and (b) the second category people who are visiting the diving center just for a recreational dive (not under a training course). During the implementation of the current study, the questionnaires were given to both categories of visitors, as both of them use the marine environment for training and/or recreational purposes.

A total of 255 questionnaires were completed. This survey constitutes a part of a large scale investigation, which focuses in understanding the diving profile of the Greek market. For this reason, the following relevant fields were postulated: (a) first of all, it was considered important to examine the demographic structure of the sampling population—in this order of idea three criteria were inspected: sex, age and nationality, (b) the second step was to describe the training level of these divers—the training level, as well as the hours of dive, reflect the divers' experience, (c) interesting was also to find the divers preferences, related to the depth and the substrate—regarding the substrate an emphasis was given to *Posidonia oceanica* meadows, (d) it is also important to inspect the role of diving centres in shaping divers' knowledge level, via the briefing procedure and (e) finally the intention of recreational divers to be involved in a biomonitoring project of wildlife conservation was investigated.

The obtained results are presented using frequencies histograms (EXCEL).

### 3 Results

The scope of the survey was the questionnaires to be completed by recreational divers. First of all, it is important to examine the demography of our sample. Three criteria were taken into consideration. The first criterion was the sex; male or female followed by the second criterion which is the age as it imposes some restrictions at SCUBA diving activities. Under the age of 18 years the participant needs the parental consent. Six age classes were studied: (i) minors which require parent consent (<18 years), (ii) students (19–30 years), (iii) 31–40 and (iv) 41–50 years (both categories include the parents and other economically independent and middle aged) (v) pre-pensioners (51–60) (vi) pensioners (>60 years old). Finally the third criterion, after the demography and sex, concerns the nationality. Two principal classes were distinguished, the Greeks and the foreigners. The results are presented in Fig. 2.

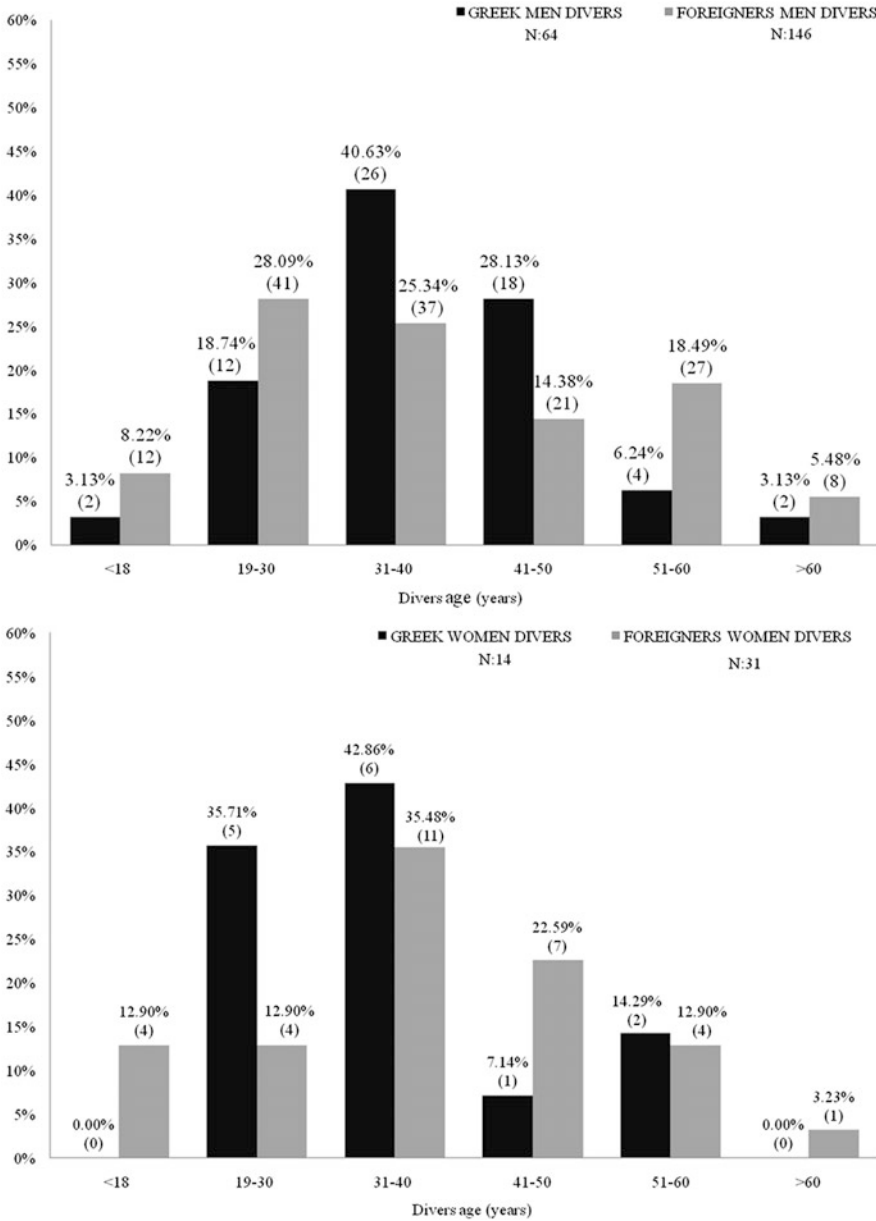


Fig. 2 Frequencies histogram (%) of recreational SCUBA divers ages' classes (men-women, Greeks- foreigners)

At the present study a total of 255 questionnaires were examined, completed by 210 men divers and 45 women divers. Women represented only the 17.65 % of the population's sample. Regarding the age classes, the minor divers (<18 years old) represented a very low percent in the subclass of Greek divers and were more abundant in the foreigners' sub population. The Greek population was mostly represented (regarding both sexes) by participants of the age class 31–40 years old. The same dominance was also observed at the subpopulation of the foreigners women divers. A general small number of pensioner divers was also noticeable. At this point it is interesting to mention that women pensioners are more active than men regarding the Greeks' subclass. As a general remark an abnormal distribution among the age classes was recorded. Probably each age class is led to the SCUBA diving activity by different parameters.

The nationality of divers seems to be one of the factors related to SCUBA diving. In some countries (as for example France, or Austria which is not a littoral country) the recreational SCUBA diving is more prevalent. The Greek divers represent the 30.59 % of the studied population. Most of the foreign divers are German (42 %), whereas the dominance of Russians and Ukrainians is also important (36 %). The main difference between the two dominant classes is that the German divers are more experienced (higher level of training) than the Russians (obtained their qualification during these holidays). A percentage of 6 % of the foreign divers are Bulgarians and it is obvious that Bulgaria appears as a growing diving market in the Balkan peninsula.

In order to facilitate the analysis of the results, recreational SCUBA divers population is divided in two variables following the sex: males and females.

SCUBA diving is a sport or activity that needs a special training and qualification. The qualification is offered by different organizations following an international approved protocol. As general standards, there are three amateur levels [following the PADI system: Open Water Scuba Diver (I), Advance Open Water Scuba Diver (II), Rescue Diver (III)]. The fourth level (Divemaster in PADI system) is the first level of professionalism and the Instructor is the professional of the recreational SCUBA diving. The obtained results are presented in Fig. 3.

The majority of divers, both male (72.86 %) and female (77.78 %), belong to the first two levels of training, and more than the half female divers have only the first diving certification. Another parameter that indicates divers' experience is the number of dive hours signed in their logbook. More than 62 % of male divers and 74 % female divers have less than 50 h of dive, which is a typical profile of the holidays' divers.

The recreational diving is characterized by several safety norms, such as the depth limit. The general philosophy is to dive into the no decompression limits. However, there are also depth limits following the skills and the training level of the divers. For example, 18 m is the depth limit for an Open Water Scuba Diver (first level), 30 m is qualified as a deep dive in the recreational mode, and 40 m is the deepest limit in recreational diving. In Fig. 4 a percentage of a class of divers who dive beyond the safety limits is also presented.

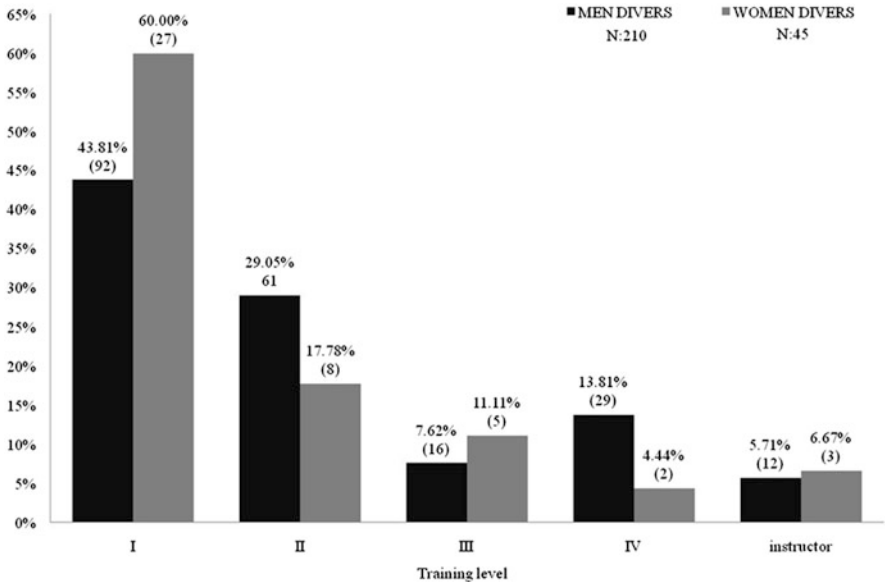


Fig. 3 Frequencies histogram (%) of the recreational SCUBA divers training level (I: Open Water Diver, II: Advanced Open Water Diver, III: Rescue Diver, IV: Divemaster)

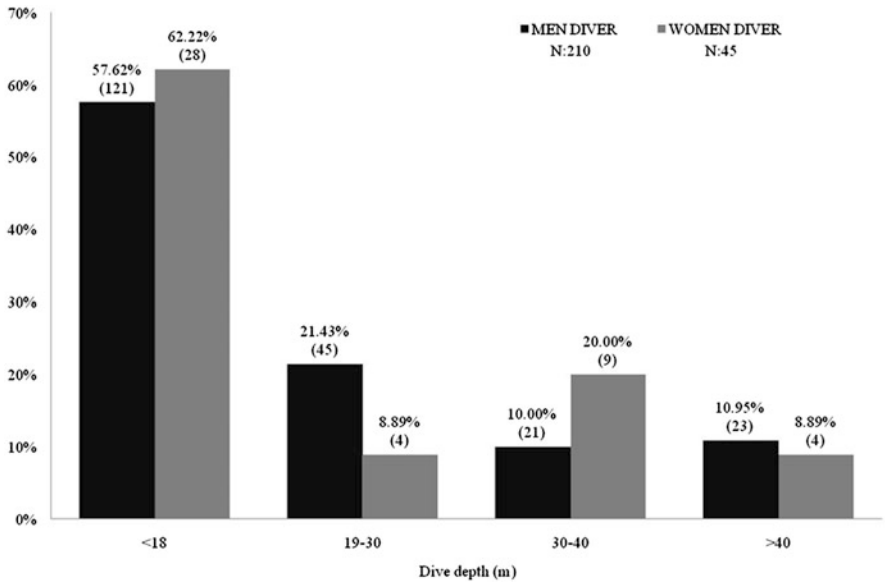


Fig. 4 Frequencies histogram (%) of the recreational SCUBA divers depth preference

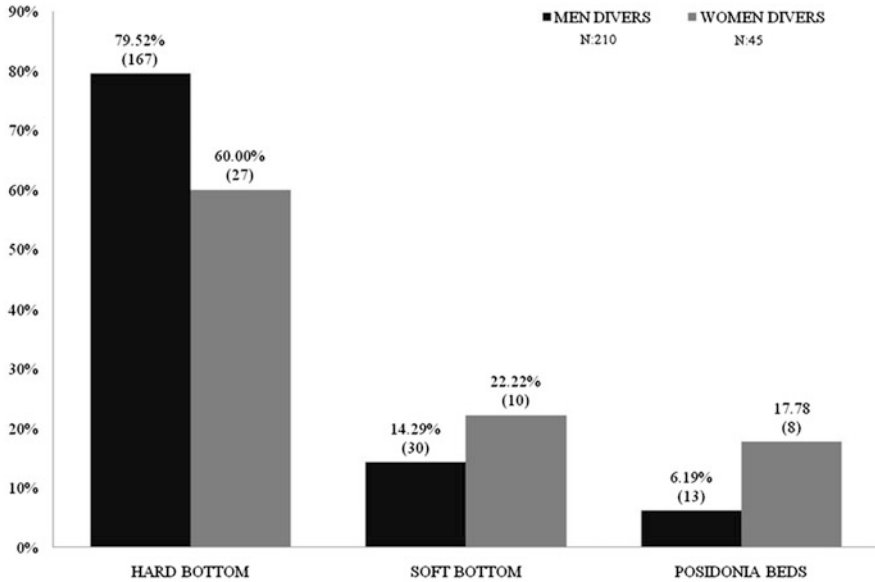


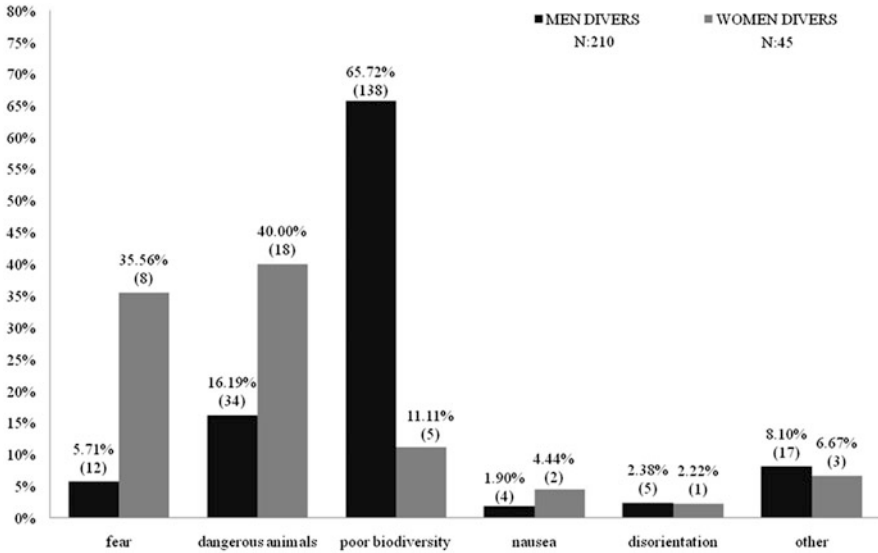
Fig. 5 Frequencies histogram (%) of the recreational SCUBA divers substrate preference

As shown in Fig. 4, more than 50 % of the divers (both sexes) prefer diving shallower than 18 m. This choice is directly correlated with the training level of the divers. However, there is a significant percentage of divers (10.95 % of the males and 8.89 % of the females) which prefer to dive beyond the safety norms. Furthermore, a percentage of 8 % of the first level male divers (limit 18 m) confirm that they dive deeper than the limit and a similar situation is also observed in the female divers.

As previously mentioned, SCUBA diving is strongly related to wildlife observation. Having that in mind, it is important to know the substrate preference of the diver, because the fauna and flora synthesis is determined by the substrate. The Mediterranean underwater ecosystem could be divided in three dominant categories: the hard bottom, the soft bottom and covered by vegetation soft bottom. At the third category belong all of the phanerogams' meadows and the most important of them is the meadows of the endemic Mediterranean species *Posidonia oceanica*. The results are presented in Fig. 5.

As a general remark, male and female divers prefer to dive on hard bottom. Moreover, female divers prefer soft bottom (sandy bottom) and *Posidonia* beds than male ones.

Analyzing Fig. 5, it is interesting to investigate the reasons why the 93.81 % of male divers and the 82.22 % of female divers avoid diving in *Posidonia* beds. As it is seen from Fig. 6 five main causes were remarked. Fear is characterized by the undefined sensation for the environment. The not familiar environment increases also the fear for dangerous animals. Another totally false conception is related to biodiversity of organisms living on/in the *Posidonia* meadows. In this case, the



**Fig. 6** Frequencies histogram (%) of the reasons why divers avoid recreational SCUBA diving in *Posidonia oceanica* meadows

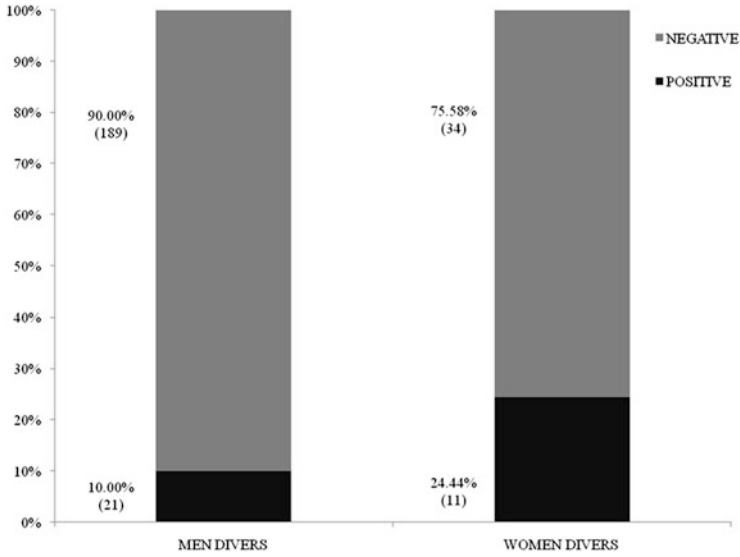
cryptic behavior is taken for absence. Hydrodynamic conditions cause the motion of *Posidonia* leaves, a situation that can induce nausea to the divers. Additionally, the green homogenous aspect of the meadows, without reference point can induce also diver’s disorientation. In the categories of “others” some divers answered that they avoid diving in *Posidonia* meadows in order not to disturb a protected ecosystem.

The main reasons why divers avoid *Posidonia* beds as a diving site are different between the two sexes. More than the half population of the female divers mentions that the causes are undefined fear and fear for dangerous animals. For men the main reason is the biotic factors, and especially the poor biodiversity. Both sexes mention reasons that are not true, whereas the real problems (nausea and disorientation) that can occur during a dive in *Posidonia* beds represent a minimum part of the recreational divers’ choices in the questionnaires.

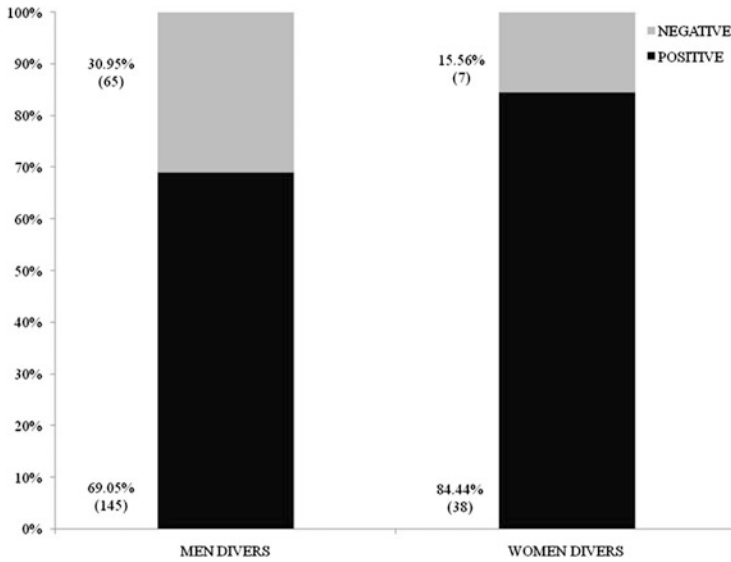
Taking into consideration the false point of view related to *Posidonia* beds, it is important to check out the pre-diving briefing. This could be accomplished via questioning the divers about their briefing and whether the diving guides give emphasis to the *Posidonia* ecosystems.

Only a minority of the divers (10.00 %-21 male divers and 24.22 %-11 female divers) have received a briefing related to the *Posidonia oceanica* (Fig. 7). Asking the providers (SCUBA diving center), it seems that most of them do not prefer to dive at this type of bottom. Additionally, only a very limited number of divers know that *Posidonia* is a protected species-protected ecosystem.

Finally, we studied the intention of recreational divers to participate as volunteers in a biomonitoring project. In Fig. 8 we see that the majority of the recreational



**Fig. 7** Frequencies histogram (%) of the divers (male and female) which receive or not a briefing related to the Posidonia ecosystem



**Fig. 8** Frequencies histogram (%) of the willingness of recreational divers to participate in an environmental project

divers are positive to join an environmental project. However, it must be noticed that women are more willing to do so than men.

## 4 Discussion

Coastal zone constitutes an important source of income, through the development of touristic and recreational activities. During the last 35 years, diving industry experiences an impressive explosion and Dignam (1990) identified SCUBA diving as one of the world's fastest growing sports, with dive travel being the fastest growing aspect of the sport.

Recreational SCUBA diving is a significant and growing component of the international tourism market and is heavily reliant upon natural marine areas and wildlife observation (Davis & Tisdell, 1996).

Based on previous studies (Van Treek & Schuhmacher, 1998), which give significant directives towards environmental management and diving tourism:

- SCUBA diving is nowadays a mass movement although the spirit of an individual adventure sport still exists.
- It should be regarded as an industry.
- In the way it developed until today, the availability and accessibility of natural habitats are the prerequisites (“means of production”).
- Coastal management efforts should be under the frame of Integrated Coastal Zone Management and take into consideration not only the environmental protection but the significance of tourism in local economy as well. Specific restrictions will directly affect the “competitive advantage” of a diving destination compared to others. Consequently, businesses may move to other sites or even different countries with less restrictions concerning SCUBA diving
- The risk of environmental damages caused by SCUBA divers can be minimized using protecting measures, training and information briefing and the dilemma “natural conservation or tourism” actually appears as a compromise between the harmonic coexistence of the environmental health and the human impact.

Under the frame of the current survey, the possibility *Posidonia oceanica* meadows to constitute a new destination for thematic diving was examined. As shown from the results, most of the divers both male and female, prefer to dive at rocky bottom. However, the impact of divers on rocky bottom habitats (coralligenous and precoralligenous formations) appears to be more dramatic (Di Franco, Ferruzza, Baiata, Chemello, & Millazzo, 2010), especially in caves. The most affected organisms seem to be the gorgonians (hexacoral and octacorals taxonomic groups), which are characteristic representatives of the rocky fauna (Di Franco, Milazzo, Baiata, Tomasello, & Chemello, 2009). Based on the above mentioned, a proposed measure towards sustainable environmental management is to orient divers to dive in less vulnerable ecosystems, as for example *Posidonia oceanica* meadows. This idea is in agreement with previous studies (Lloret et al.,



2006) which indicate that the marine phanerogam *Posidonia oceanica* is in the lowest scale (1) among the sensitive to SCUBA diving marine organisms (Fragility values assigned to the selected species: 1 = low, 2 = medium, 3 = high). However, it is important to keep in mind that *Posidonia* ecosystem is an endangered species and habitat.

In order to minimize the ecological impact of SCUBA diving on *Posidonia oceanica* meadows one must know the main threats of this ecosystem. Previous studies (Milazzo et al., 2002) remark that one of the major risks related to SCUBA diving activities is anchoring at the phanerogams' meadows. Most of the recreational dives require transportation by a boat which has to anchor and wait for the divers. Anchor can induce damage to the *Posidonia*'s rhizomes and shoots. The comparison among three types of anchor, hall, danforth and folding grapnel, suggests that the first one is the most preferable in order to minimize the impact in comparison with the other two anchor types (Milazzo, Badalamenti, Ceccherelli, & Chemello, 2004). Additionally, comparing the three anchoring stages: anchor fall, dragging lock-in and weighing, the most critical stage seems be the last one (Milazzo et al., 2004). In order to minimize the boats' impact it is very important to inform the providers (SCUBA diving center) for the appropriate type and the use of the anchors. Another more ecologically friendly measure is the installation of permanent anchoring systems, such as the HARMONY type anchoring system (Díaz-Almela & Duarte, 2008), applied in many MPAs, as for example in the National Marine Park in Zakynthos (Greece).

Besides the problems arising from the anchoring, other types of disturbance exist provoked by SCUBA divers to phanerogam meadows: direct contact of their equipment (such as fins or manometer) with the organisms, turbulence of the sediment induced by the fins and finally damage of the marine environment can occur when divers kick, hold, bump into, stand on or kneel on the bottoms (Di Franco et al., 2010; Luna, Valle Pérez, & Sánchez-Lizaso, 2009). When dealing with *Posidonia oceanica* beds, it is necessary to add to the previously mentioned threats the damage of the biotope due to the uncontrolled buoyancy, when the inexperienced divers try to stabilize themselves and cut *Posidonia oceanica*'s leaves or remove entire shoots. According to Luna et al. (2009), female divers are more careful than male divers (less contact with the sea bottom). In the same study, authors (Luna et al., 2009) remark that pre-diving briefing by a SCUBA leader, as Divemaster or Instructor, can reduce significantly flapping and divers' contact with any part of the body.

The pre-diving briefing is mandatory for the participants in all SCUBA diving organizations. The aim of the current study is not to demonstrate the significance of briefing, but to focus on whether the guides emphasize on the wildlife in general and especially on *Posidonia* beds. Based on our results, a very low percent of divers receive some information concerning the vulnerability and the protection status of *Posidonia oceanica*. In addition, the percentage of women is higher than that of men, although both of them attend the same training course. As a general remark, the pre-diving briefing could play important role in the public awareness on environmental issues and on the protection of natural resources. Previous studies

underline the importance of briefing as well (Luna et al., 2009; Medio, Ormond, & Pearson, 1997). Regarding the current survey, the lack of an appropriate briefing procedure could be responsible for the false opinion of the divers for *Posidonia oceanica* meadows (fear for dangerous animals, wrong point of view for the biodiversity). Following this hypothesis it is important to educate properly the diving guides in order to be able to provide to the users correct information, reflecting the wildlife.

The main question that needs an answer is why a recreational diver could make the choice to dive in *Posidonia* beds? There are many reasons to dive in this Mediterranean ecosystem:

- The bathymetric distribution of *Posidonia oceanica* is close to the depth limit of recreational diving. The meadows are present even at very shallow waters, accessible for all divers and for the Discover SCUBA Diving project as well.
- The ecological impact is minimal if the divers manage to control their buoyancy.
- Diving in *Posidonia* meadows can be combined to specialties offered by SCUBA organizations such as Underwater naturalist, Fish identification, Underwater Digital Photography (in PADI schedules).
- This endemic Mediterranean habitat is the ideal site to promote public environmental awareness and ecological education.

Furthermore, the properly informed and sensitized recreational divers constitute a dynamic scientific tool. In the Mediterranean Sea two characteristic examples exist concerning the participation of recreational divers in biomonitoring projects: for seahorses *Hippocampus hippocampus* and *Hippocampus ramulosus*, which are strongly related to phanerogams' beds (Goffredo et al., 2004) and for the red coral *Corallium rubrum* (Bramanti, Vielmini, Rossi, Stolfa, & Santangelo, 2011). In both previous studies an appropriate informative sheet was given to the participants.

A vulnerable ecosystem as the meadows of the endemic species *Posidonia oceanica* needs a large scale biomonitoring survey with a huge budget. Educating the recreational divers and involving them in a scientific project is probably the new dynamic low cost approach for the marine wildlife management. Based on the results of the current survey, the majority of divers, male and female, have the intention to participate as volunteers in a scientific project.

As a general conclusion, *Posidonia* diving appears to be a new challenging destination into the Mediterranean basin. The benefits of this are numerous. First of all, it is an opportunity for the Mediterranean countries to introduce an innovative product in the diving industry. In this order of idea it is important to educate and inform the SCUBA diving centers about how to promote and make attractive this new product. Furthermore it is important to change the false point of view which accompanies this species, such as "the dirty beach with *Posidonia*". *Posidonia oceanica* constitutes the most important biotic index of the environmental health and of the water quality in the Mediterranean Sea. Under this frame, the next step is to define the guidelines for diving in *Posidonia oceanica*, in collaboration among

SCUBA diving services providers, the recreational SCUBA divers communities and the scientific divers.

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**Part III**  
**Methodologies, Tools and Approaches**  
**for Managing Tourist Destinations**

# Dark Cities? Developing a Methodology for Researching Dark Tourism in European Cities

R. Powell and J. Kennell

**Abstract** Despite the recent growth of research into dark tourism (Dale & Robinson, 2011; Lennon & Foley, 2000 Thomson, 2000; Stone, 2013; Tarlow, 2005) and the growth of the dark tourism market (Biran & Hyde, 2013; Stone, 2005; Stone & Sharpley, 2008), there has been little interest shown in understanding the relationship between dark tourism and urban tourism (Page & Hall, 2002). This paper presents the initial findings of a research project that investigates the dark tourism products offered by European cities. A series of keywords were developed following a review of the dark tourism literature and this was used carry out a content analysis of the Destination Marketing Organisation websites for Europe's ten most visited cities. The content analysis used Stone's (2006) Dark Tourism Continuum to evaluate the dark tourism products offered in each destination and to present a descriptive overview of Europe's city-based dark tourism offer. The paper concludes that there are a wide range of dark tourism products available to urban tourists in Europe, but that these are rarely conceptualised as such. The mixture of 'light' and 'dark' dark tourism products presents difficulties in categorisation and standardisation of the urban tourism offer, but this is a potential area of new product development for DMOs across Europe.

**Keywords** Dark • Cities • Tourism • Urban • Destination Marketing Organisations • Dark Tourism Products • European

## 1 Introduction

The academic study of dark tourism gathered momentum in the early twenty-first century, and is reflecting the growing interest of the citizens of postmodern societies in the sites of death and disasters—an interest that needs deeper research to be understood fully. It also reflects the increased sensitivity of the international community to the significance of such events for nations, national identities and

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the direction of their history. Dark tourism sites offer the opportunity to capture and conserve the “dark” memory of humanity and make it available, through domestic and international tourism, to the wider public. It should also be noted that vicarious thrill seeking and entertainment motivations are also significant factors that have affected the recent growth of the dark tourism sector. This study of dark tourism in an urban setting, therefore, offers the opportunity to investigate the many ways in which dark tourism offerings are packaged and presented as tourism products within a significant sector of the tourism industry.

## 2 Dark Tourism

Dark tourism can be defined as tourism associated with the visitation of sites which have death, tragedy or suffering as their main theme. Commonly such visits are conducted with commemoration, education or entertainment in mind (Stone, 2005). Europe has an abundance of such sites, both real and imagined which offer ample opportunities to experience dark tourism in all of these ways if so desired. However, they are rarely conceptualised as dark products, and as such categorisation of individual attractions is, at the moment, confused.

A much observed trend in modern tourism is that tourists are increasingly moving towards niche or specialist holidays. The days of the 3 s’s (sun, sea, sand) mass tourism package holidays are not yet over, but there are an increasing number of viable options open to both the more adventurous tourist as well as those looking for a more homogenised and pre-packaged experience. Lennon and Foley (2000) have largely been credited with coining the phrase “dark tourism” in “Dark Tourism: The Attraction of Death and Disaster” They sought to signify what they identified as a “fundamental shift in the way in which death, disaster and atrocity are being handled by those who offer associated tourism ‘products’ ”(p. 3). In doing so, they identified that dark tourism as it is presented in a modern context is the product of the late modern world, and is intimately connected to the political, sociological, economic and technological landscape within which modern tourism products are made available. That is to say, whilst death and disaster have always had a universal appeal, the circumstances of modern media, accessibility and technology mean that interest in dark sites is at an unprecedented level, and the tourism industry should be capable of making every effort to provide a product which meets the demand for such dark experiences. The increasing consumerism of post-modern western societies has a tendency towards making such experiences much more entertainment based.

The concept of dark tourism however is not a new one. Tourists have been drawn to battlefield sites, places of execution, tombs and other related sites for a very long time (Stone, 2005). Seaton (1996) has identified dark tourism as being the visitation of sites associated with death and disaster, something which dates from the Middle Ages at least. Dale and Robinson (2011) also identify Dark Tourism as being an

established practice as far back as the Eleventh Century. It is possible to argue that dark tourism as an actuality was established in ancient times: a compelling thought if we consider the popularity of Roman Gladiatorial contests for example.

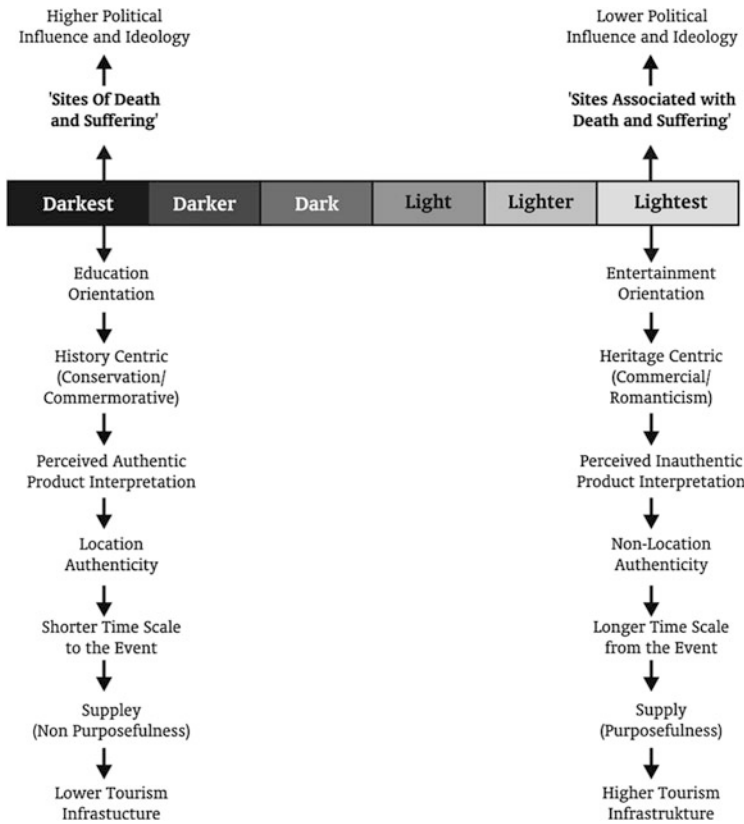
Historically it can be seen that tourism has always had aspects of dark tourism in its gaze. Several commentators (Lickorish & Jenkins, 1997; as cited in Lennon & Foley, 2000; Vellas & Becherel, 1995) have identified that pilgrimage is one of the earliest forms of tourism. Pilgrimage sites are often associated with death in one form or another, with religious pilgrims often visiting the site of the death, or the graves of individuals or groups. Such visits tend to have religious or spiritual associations relevant to the pilgrims visiting, and are seen as acts of remembrance, commemoration or veneration, and usually feature as part of a ritualistic or tokenistic ceremony, perhaps tied to a particular religious or even secular calendar. It is clear that such ritualistic approaches to commemoration are not solely the stuff of sanitised tourism products within the remit of the modern tourism industry. It should be recognised that there is an increasing demand for dark tourism products which offer a connection with scenes of suffering and death. That is not to say that this is a completely modern phenomenon: visitation to scenes associated with death in particular; battlefields, graveyards and the former homes of dead celebrities for example, have proven to be a significant motivator in tourism in past-times as well. However, of particular significance to this study is the consideration of the commodification of such sites has transformed the tourism industry in such a way as to generate demand for, as well as access to, dark tourism experiences.

The attraction of death, disaster and the macabre promises to be a significant factor in the tourism sector worldwide, and in Europe in particular. Dark tourism, or thanotourism as it is sometimes called, offers the interested participant the chance to “gaze upon real or recreated death” (Stone, 2005: 3.) The fascination with scenes of tragedy is not unique to any one set or group of tourists, but dark tourism, as yet, remains on the fringes of respectability: a number of authors have given consideration to “shades” of dark tourism (Lennon & Foley, 2000; Stone, 2005; Strange & Kempa, 2003) which is to say that it is recognised that there is a continuum of “dark” touristic experiences, ranging from very mild excitement to the grim reality of the holocaust and terrorism, for example.

Stone (2005) considers dark tourism to be an old concept in a new world. That is to say that the fascination with scenes of death and disaster are old and quite possibly universal, but what is new is the way in which there is a commercialised and functional tourism industry able to make very much more available to very many more people than was the case in the past. The definition of dark tourism is wide and varied. Smith (1998) argues that sites associated with war probably attract more visitors than any other single type of attraction. Dark tourism is a widespread and growing reality and it is an important factor when considering the supply and demand of sites and attractions.

The motivations for visiting dark sites is an under-researched area (Sharpley & Stone, 2009), and somewhat beyond the remit of this paper. However, Stone (2005) identifies that the desire to create a mercantile advantage or manipulate a particular site for political reasons are usually the primary supply-side factors which will





**Fig. 1** A dark tourism spectrum: perceived product features of dark tourism within a “darkest-lightest” framework of supply (Stone, 2006)

determine whether a Dark site is developed or not. It should also be noted that a usual explanation for the establishment of Dark sites is that they allow contemplation of one’s own death—the *memento mori* effect (Walter, 2006). Inauthentic offerings allow this contemplation to be at several stages removed, unlike the horror of a death camp for example. There is also a marked reluctance to be seen to be making money from other people’s suffering, and it may be that esoteric questions of taste cloud the development of more authentic dark sites.

It is often observed in the literature that dark tourism has a continuum of darkness (see Fig. 1). At the darkest end of that continuum, attractions are categorised largely on the basis of real, recent and actual suffering and death. There is often an educational and commemorative rationale which underpins the establishment of an attraction, very often being the authentic site of the suffering which is visited, such as at Auschwitz or the site of the Twin Towers in New York.

Stone (2006) recognises that the connection with Dark Tourism at particular sites is fluid, and the relative darkness of each attraction lies along a continuum,

ranging from the very dark (Auschwitz, for example) to the commodified, entertainment based attraction, such as the London dungeon which represents gruesome torture as family entertainment. Stone's continuum is the basis on which attractions in Europe will be referenced for the purposes of this study.

### 3 Urban Tourism in Europe

Urban tourism is a challenging and multi-disciplinary field of study that draws on areas including sociology, urban studies, planning and architecture, as well as traditional tourism research (Selby, 2004). Research in urban tourism has been prompted by the recent dramatic growth of tourism to cities. Urry (2002) noted that the shift of tourism to urban areas from traditional coastal destinations has accompanied a broader shift within postmodern culture, which prioritises consumption, accessibility, culture and technology, which began in the 1980s. Gale presents Urry's (1994) set of processes that exemplify the postmodern transformation of culture, and therefore tourism. These are based on Harvey's (1989: 340–341) categorisations

- Clock time to instantaneous time
- Writing and substance to image and surface meaning
- Occupation and home to consumption and play
- Fordism to post-Fordism
- Globalization to Localization (Gale, 2005: 92–93)

Some implications of this are highlighted:

- Overseas travel (image, status) becomes more desirable
- Overseas travel becomes easier and more affordable due to time-space compression
- 'post-tourists' or 'post-modern tourists' didn't like the regimented Saturday to Saturday element of traditional holidays (Gale, 2005: 94)
- The weakening of group identities and associations affects places designed to service these groupings and offer an alternative to an older form of the collective holiday experience.
- The importance of fashion and taste—older resorts become 'tasteless' (Gale, 2005: 93)

By the end of the 1990s, many post-industrial cities were seeking ways of diversifying their economies, and tourism development offered opportunities for investment and promotion (Ben Dalia et al., 2013). Hoffman (2003) studies the development of Harlem, New York in the post-Fordist period from the perspective of regulation theory and shows how significant changes in the local economy over a period of 30 years have provided specific opportunities for tourism development in the area. For example, cultural diversity has become a key aspect of marketing in a highly differentiated market place and the area of Harlem can offer products and

services that meet the needs of many different cultural segments, as well as the desires of tourists to consume diverse products, leading to a growth in niche tourism products such as cultural tourism which are an example of 'flexible specialisation', a concern of regulationist approaches to understanding post-Fordist economies. Whilst noting that tourism appears to function well as an economic engine for urban areas, Gladstone & Feinstein note that 'the distributional consequences of tourism are more debatable' (2001: 38).

Urban tourism offers a number of benefits to destinations. Unlike other forms of tourism, it displays little seasonality, attracts relatively well educated and well-off tourists and provides opportunities for niche tourism development such as business tourism (Davidson, 1996) and cultural tourism (Richards, 2007). Urban tourism is now a core part of urban redevelopment and competitiveness strategies (Richards & Wilson, 2007; Smith, 2007; Spirou, 2007; Zukin, 1995), but this only serves to reinforce the already central role of tourism and culture in the development and image of urban areas. As Sharon Zukin points out, "For several 100 years, visual representations of cities have 'sold' urban growth. Images, from early maps to picture postcards, have not simply reflected real city spaces; instead they have been imaginative reconstructions—from specific points of view—of a city's monumentality" (1995: 16). The huge competition between cities, coupled with the growth in accessible transportation and the emergence of new economies into the global economy, has meant that cities that have not historically been well-known tourism destination to enter the tourism industry, leading to increased global competition between cities for urban tourists (Ben Dalia et al., 2013). Because of this, it is important for cities to understand areas of the tourism market in which they can offer novel and unique experiences to tourists, to increase their attractiveness—The growing Dark Tourism market (Biran & Hyde, 2013; Stone, 2005; Stone & Sharpley, 2008) offers a way for many cities to become more competitive in this sense.

If we define urban tourism simply as tourism that takes place in urban areas, it becomes more important to develop a thorough understanding of the components of urban tourism destinations. Selby (2004), in his review of previous writing on urban destinations, includes the following aspects of cities as forming part of the foci of urban tourism research: historic cities, casinos, urban regeneration, major sporting events, visitor management, historic districts, entertainment districts, tourist zones and sacred spaces. Van der Borg, and van der Meer (1995) describe the five aspects of what they call a 'tourist city'. Firstly, primary products. These are the core reasons why tourists visit a city and can include natural features, historical attributes and specialist tourism facilities such as conference venues, sporting arenas and museums. Next are the secondary products and services, such as accommodation, retail, restaurants and information, which are necessary for generating staying visits, as opposed to day visits in a city. External transport is the third aspect of the tourist city, highlighting the connectivity of the city to tourism-generating regions. The fourth aspect is internal transport: the city must be easily navigable to tourists to ensure that the whole city becomes a resource to tourism, again extending the length of visits. Finally, the tourist city must have a developed tourism image. The

image of the city is developed from the relationship of the first four elements to the marketing activities of the city's Destination Management Organisation and the perception of the city held by potential visitors.

An argument of this paper is that dark tourism products form a core part of many cities' tourism offer and that this has not been captured to date in the literature on urban tourism. In terms of Van den Berg et al.'s description of the tourist city, this paper aims to explore the possibility of dark tourism as a primary product for European cities, with implications for the marketing activities of Destination Management Organisations in the region.

## 4 Methodology

This paper presents the initial findings of an exploratory research project that has the aim of understanding the significance of dark tourism in the tourism offer of European cities. It follows on from research by Powell and Iankova (2015) which explored the nature of London's dark tourism offer. The current research will be used to identify a series of case studies of dark tourism in European cities for further research over the next 3 years.

This initial, exploratory research, was carried out using a content analysis methodology. Content analysis is a method of qualitative data analysis (QDA) that involves "careful, detailed, systematic examination and interpretation of a particular body of material to identify patterns, themes, biases and meanings" (Berg, 2007: 304). This method of QDA contains elements of a more quantitative approach as it typically involves a systematic unitising of textual data, amongst which the researcher will look for relationships; frequently the results of this method will be presented numerically or analysed using statistical techniques. However, Berg (2007: 308) points out that to think of content analysis as a quantitative procedure is to concentrate too heavily on the process of data manipulation and to under-represent the process of analysis of the data which "involves developing ideas about the information found in the various categories, patterns that are emerging, and meanings that seemed to be conveyed. In turn, this analysis should be related to the literature and broader concerns and to the original research questions." Approaching content analysis in this way brings it in line with interpretive QDA methods and this is the approach taken to content analysis in this research.

For this exploratory research, a purposeful sample (Bryman & Bell, 2007) was constructed to allow for the collection of an initial set of data on European cities and Dark Tourism. An extreme case (Saunders et al., 2007) approach was taken to choosing which cities were included in the sample to increase the likelihood that the chosen cities would provide sufficient data on their tourism products to support this initial phase of research. Using the most recently published Euro monitor data for international tourism arrivals (Euromonitor, 2014), the following list of the top ten European tourist cities was constructed as the sampling frame for this research.

**Table 1** Top European tourist cities

City	International arrivals	Destination management organisation	Website (English version)
London, UK	16.8 m	Visit London	<a href="http://www.visitlondon.com/">http://www.visitlondon.com/</a>
Paris, France	15.2 m	Paris info	<a href="http://en.parisinfo.com/">http://en.parisinfo.com/</a>
Rome, Italy	8.68 m	Rome official tourist site	<a href="http://www.turismoroma.it/?lang=en">http://www.turismoroma.it/?lang=en</a>
Prague, Czech Republic	6.20 m	Prague.eu	<a href="http://www.prague.eu/en">http://www.prague.eu/en</a>
Milan, Italy	5.8 m	Visitamilano	<a href="http://www.visitamilano.it/turismo_en/">http://www.visitamilano.it/turismo_en/</a>
Barcelona, Spain	5.52 m	Barcelona Turisme	<a href="http://www.turismedebarcelona.net/">http://www.turismedebarcelona.net/</a>
Amsterdam, Netherlands	5.20 m	I am Amsterdam	<a href="http://www.iamsterdam.com/en/visiting">http://www.iamsterdam.com/en/visiting</a>
Vienna, Austria	5.18 m	Welcome to Vienna	<a href="http://www.wien.info/en">http://www.wien.info/en</a>
Venice, Italy	5.16 m	Venice tourism	<a href="http://www.venice-tourism.com/en/visit-venice.html">http://www.venice-tourism.com/en/visit-venice.html</a>
Sofia, Bulgaria	4.49 m	Visit Sofia	<a href="http://visitosofia.bg/en/">http://visitosofia.bg/en/</a>

The content of each DMO website was searched using the keywords in Table 1. A system of keywords was used to categorise the data that refers to themes and concepts of relevance to this research that have been developed in the preceding sections on dark tourism and urban tourism. This is a *deductive* method of code generation (Berg, 2007), that formed a starting point for an *inductive* process of further categorising the data to allow for the emergence of additional information of relevance to the research.

The Keywords were chosen because they are most often used in the literature when referring to the concept of dark tourism. For example, in their ground-breaking work Lennon & Foley make use of all ten key words in describing and framing dark tourism experiences. Similarly, Stone makes use of several (especially “dark”, “macabre”, “tragedy” and “suffering” repeatedly in his assessment of the topic (Stone, 2005, Stone, 2006). These works have, to a large extent, provided the framework for much of the study that has come in recent years, including this paper.

It is not to be assumed that the study of death related tourism is necessarily a grim one. Far from it; indeed, Stone (2013: 1) says “. . .the study of dark tourism is not simply a fascination with death or the macabre, but a multi-disciplinary academic lens through which to scrutinise fundamental interrelationships of the contemporary commodification of death with the cultural condition of society”. Therefore, any number of key words could have been chosen, but the fundamental importance is that they reflect the essence of what dark tourism is perceived as offering, namely, “the act of travel to sites associated with death, suffering and the seemingly macabre” (Stone, 2006: 146.)

A quick overview of key word citations in the literature which has sought to explore the topic shows that there is a consensus that dark tourism is widely regarded as being generated by an interest in sites of death (in various forms, for example from actual sites of death to cemetery visitation), which often have historical or commemorative aspects in some way.

The data presented by the documents collected according to the categories set out in table three was coded and sorted to allow the construction of descriptive statistics about the data. Thematic patterns and clusters of information and meaning were also be identified and reported on. This process of analysis will follow the steps set out by Creswell (2007) of first producing a detailed *description* the data and secondly making an *interpretation* of the data.

## 5 Findings

The tables below show the results of the content analysis that was carried out of the European DMO websites outlined in Table 2.

From the application and analysis of the keywords used to identify themes of interest, it is clear that each of the cities studied engages in some elements of what might be classed as “dark tourism”.

It was noticeable that the key word which brought the most response was “historical”. This reflects the fact that often dark tourism is very closely linked to heritage and history, particularly when the host city has a well-established tourism infrastructure (London, Paris and Prague, for example) coupled with a well-defined heritage sector.

The most significant likelihood of any of the key words producing a “hit” was in the context of museums, galleries and theatres. These three attractions account for the bulk of hits across all keyword categories. It was also noticeable that a number of accommodation options were keen to emphasise their historical qualities in order to encourage bookings.

However, there were a broad range of attractions across the continuum (Stone, 2006), including torture museums, for example, designed to vicariously thrill rather than be a serious study of the topic, and some more serious attempts at commemoration for wars and the holocaust (Table 3).

London is the most visited city in the world. It offers a range of attractions of all sorts to visitors and tourists. Its “dark” offerings are surprisingly inauthentic (Powell & Iankova, 2015) considering its rich and long history. It does, however, have a focus on heritage and history and there are many museums which may be considered as having some elements of dark interest. Commemoration, remembrance and historicity form the main dark components. A significant “hits” in the web search related to theatrical shows and artistic exhibitions in particular (Table 4).

Paris has many dark attractions, although often not developed as such. A large part of its revolutionary history, for example, has been expunged to some degree,

**Table 2** Codes used for content analysis

Keyword	Source
Dark	Lennon and Foley (2000) Stone (2006) Strange and Kempa (2003) Walter (2006) Seaton (1996) Dale and Robinson (2011) Sharpley and Stone (2009)
Death	Lennon and Foley (2000) Stone (2006) Walter (2006) Seaton (1996) Dale and Robinson (2011) Sharpley and Stone (2009)
Tragedy	Lennon and Foley (2000) Stone (2006) Walter (2006) Dale and Robinson (2011) Sharpley and Stone (2009)
Suffering	Lennon and Foley (2000) Stone (2006) Walter (2006) Dale and Robinson (2011) Sharpley and Stone (2009)
War	Lennon and Foley (2000) Walter (2006) Smith (1998) Dale and Robinson (2011) Sharpley and Stone (2009)
Disaster	Lennon and Foley (2000) Walter (2006) Dale and Robinson (2011) Sharpley and Stone (2009)
Macabre	Lennon and Foley (2000) Dale and Robinson (2011) Sharpley and Stone (2009)
Historical	Lennon and Foley (2000) Strange and Kempa (2003) Seaton (1996) Smith (1998) Dale and Robinson (2011) Sharpley and Stone (2009)
Commemoration	Lennon and Foley (2000) Walter (2006) Dale and Robinson (2011) Sharpley and Stone (2009)
Holocaust	Lennon and Foley (2000) Walter (2006) Dale and Robinson (2011) Sharpley and Stone (2009)

**Table 3** Dark frequency table for London

Keyword	Frequency
Dark	172
Death	76
Tragedy	20
Suffering	13
War	219
Disaster	5
Macabre	5
Historical	661
Commemoration	31
Holocaust	9
Total	1211

**Table 4** Dark frequency table for Paris

Keyword	Frequency
Dark	43
Death	38
Tragedy	3
Suffering	11
War	67
Disaster	0
Macabre	0
Historical	370
Commemoration	11
Holocaust	0
Total	543

meaning actual sites of historic interest are often commemorated with a plaque and little else. The city's Catholic past also means sites like the catacombs and an ossuary, for example, remain historical relics rather than an attempt to create dark attractions per se (Table 5).

Rome sees no real benefit in advertising itself as a dark city. It believes its ancient and classical past is sufficiently well known not to need the additional pull of dark fascination. Many of its sites of death (the Coliseum, for example) are mentioned in a very matter of fact way and without sensationalism (Table 6).

Prague is probably the darkest city of all those in the sample. It has the most extensive variety of truly dark sites, both actual and inauthentic, most of which are developed for tourism in some way. It covers the whole range of Stones' (2006) typology, and has attractions from the lightest to the darkest (Table 7).

Milan has very few attractions which might be considered dark. The hits reflected in this table are due to the existence of a museum, rather than specific sites which have dark themes (Table 8).

Barcelona has a number of sites related to the civil war of the 1930s, and in particular a number of artistic and musical events which recall the war (Table 9).



**Table 5** Dark frequency table for Rome

Keyword	Frequency
Dark	8
Death	17
Tragedy	0
Suffering	2
War	180
Disaster	1
Macabre	1
Historical	47
Commemoration	2
Holocaust	1
Total	259

**Table 6** Dark frequency table for Prague

Keyword	Frequency
Dark	127
Death	39
Tragedy	4
Suffering	5
War	99
Disaster	0
Macabre	0
Historical	248
Commemoration	2
Holocaust	5
Total	529

**Table 7** Dark frequency table for Milan

Keyword	Frequency
Dark	0
Death	1
Tragedy	0
Suffering	0
War	6
Disaster	0
Macabre	0
Historical	1
Commemoration	0
Holocaust	0
Total	8

Amsterdam is a city which is used to attracting tourists, and dark themes often presented in a way which looks to exploit their touristic value; it has a Torture Museum, for example, designed to entertain. There is an argument that the sex trade may in itself constitute a dark theme, and in that sense Amsterdam is positioned

**Table 8** Dark frequency table for Barcelona

Keyword	Frequency
Dark	4
Death	11
Tragedy	0
Suffering	1
War	71
Disaster	0
Macabre	0
Historical	1
Commemoration	0
Holocaust	0
Total	88

**Table 9** Dark frequency table for Amsterdam

Keyword	Frequency
Dark	47
Death	9
Tragedy	1
Suffering	0
War	45
Disaster	1
Macabre	0
Historical	1103
Commemoration	1
Holocaust	3
Total	1210

well to further develop such aspects. The very high hits generated by the word “historical” is largely explained by the very large number of hotels in particular which were keen to establish links with the past in an effort to appeal to tourists who it must be assumed are visiting for a diverse range of reasons (Table 10).

Vienna acknowledges its past, particularly in relation to WW2, but it is keen to emphasise the more cultural and musical aspects of its history and heritage. A number of hits were related to musical and theatrical offerings not linked to real dark events. However, the Holocaust is commemorated sensitively and in a way which is accessible to tourists (Table 11).

Venice does not seek to attract tourists by employing “dark” themes. This may well be due to the fact that it emphasises other aspects of its location and heritage, possibly because it is these aspects which are proving remarkably good at attracting sufficient tourists, and if anything the city is seeking ways to reduce the sheer number of day visitors (Table 12).

Sofia is only really just developing its outward looking tourist appeal. There are a number of soviet era monuments which commemorate WW2, and a number of museums which may be considered in that category. However, its relatively high

**Table 10** Dark frequency table for Vienna

Keyword	Frequency
Dark	35
Death	65
Tragedy	7
Suffering	14
War	120
Disaster	10
Macabre	3
Historical	155
Commemoration	10
Holocaust	3
Total	422

**Table 11** Dark frequency table for Venice

Keyword	Frequency
Dark	11
Death	0
Tragedy	0
Suffering	0
War	4
Disaster	0
Macabre	0
Historical	0
Commemoration	0
Holocaust	0
Total	15

**Table 12** Dark frequency table for Sofia

Keyword	Frequency
Dark	6
Death	5
Tragedy	0
Suffering	0
War	33
Disaster	0
Macabre	0
Historical	10
Commemoration	0
Holocaust	0
Total	54

ranking when using a key word search can be explained by the fact that, for example when searching for “war” the search engine will return words which include those letters as a sequence, as in “aWARness”, for example.

## 6 Conclusions

All of the cities considered are aware of “dark tourism” as a searchable theme, although some are less concerned about the exploitation of dark themes than others or regard other aspects of their tourism offerings to be pre-eminent.

A preliminary ranking of those cities which offer the most “dark” themed results, when adjusted to discount those hits which were not within the scope of Stone’s (2006) typology would be:

It should be noted that Stone’s continuum shows dark attractions ranging from the very darkest to the lightest. It is important to remember, therefore, that to be “dark” does not necessarily mean a city would need to position itself at either end of the scale to successfully attract tourists. Indeed, the top five in Table 13 demonstrate that successful marketing based on perceptions of darkness involves the development of a tourism infrastructure which can exploit a variety of opportunities. Of course, it should also be remembered that different attractions on the continuum require different approaches, bearing in mind the commercial exploitation of the darkest sites is controversial to say the least.

This paper, therefore, sought to identify the extent to which dark tourism is a significant factor (or otherwise) in the development of urban tourism in a European context. Having established that dark tourism is a factor in the touristic offering of the most visited cities, albeit more so in some than others, the authors’ intentions are to further develop this research in a way which more accurately maps the dark tourism offer and to examine its potential to further develop urban tourism by developing an integrated network of European “dark” cities, seeking to unite a clearly established motivating factor (demand) to ways in which that demand can be satisfied (supply).

**Table 13** Ranking of cities on a subjective perception of dark themes

1. Prague
2. London
3. Paris
4. Amsterdam
5. Barcelona
6. Rome
7. Vienna
8. Sofia
9. Venice
10. Milan

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# Motivations in Battlefield Tourism: The Case of ‘1916 Easter Rising Rebellion’, Dublin

Jithendran Kokkranikal, Yeon Sun Yang, Ray Powell, and Elizabeth Booth

**Abstract** Journeys to battlefields or war-related sites are categorised as dark tourism. Dark tourism is travelling to sites associated with death, disasters or atrocities and has emerged as a major tourist attraction. It involves visiting concentration camps, war memorials, cemeteries, scenes of mass murder, horror museums, fields of fatality, sites of natural disasters and perilous places, and has been varyingly described as ‘morbid tourism’, ‘milking the macabre’, Thana tourism ‘black spots tourism’ or ‘sensation sights tourism’ and ‘the heritage of atrocity tourism’. Battlefield tourism can be defined as travelling to war-related sites to remember and commemorate the fallen focusing on spiritual and emotional experience. The battlefields and other artefacts associated with warfare have been drawing visitors for many centuries. A trip to war-related sites could take many different forms, and visitor backgrounds, attitudes and their reasons for visiting war-related sites could also vary. This paper reports findings of a study examining motivations of visitors to major battlefield destinations related to the ‘1916 Easter Rising Rebellion’. This study employed quantitative research methods with a questionnaire survey at two different sites and a tour associated with Easter Rising rebellion in Dublin, Ireland.

**Keywords** Battlefield tourism • Dark tourism • Thana tourism • Dublin • Pilgrimage • Easter rising

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## 1 Motivations in Battlefield Tourism: The Case of ‘1916 Easter Rising Rebellion’, Dublin

This paper reports findings of a study examining motivations of visitors to major battlefield destinations related to the ‘1916 Easter Rising Rebellion’. Battlefield tourism can be defined as travelling to war-related sites to remember and commemorate the fallen focusing on spiritual and emotional experience (Baldwin & Sharpley, 2009). Over the last century, tourism which is related to wars and conflicts has grown extensively. Many armed and political conflicts have occurred in the last century and they seem to recur as evidenced by the current global geopolitical developments (Baldwin & Sharpley, 2009). Seaton (1999) points out the large number of British tourists visited Belgium to see the sites of the battle of Waterloo after 1815. Leisure tourists came to gaze at the land of death with curiosity while some came to the battlefield to mourn and remember the dead as pilgrims. Majority of them were the relatives of the fallen and wounded. According to Seaton (1999) this was the first great battle site which lured tourists. Due to the sacrifice of young soldiers and the glory of victory, the sites of the battle of Waterloo were a sacred place for the British tourists and relatives of the dead (Seaton, 1999).

World War II (WWII) also played a key role in the growth of the battlefield tourism. After the WWII, survivors, veterans and tourists visited places where major battles and consequent death and destruction happened (Beech, 2009). Also a large number of people visited areas where the Pacific war took place and Vietnam after the Vietnamese war (Agrusa, Tanner, & Dupuis, 2006; Henderson, 2000). A large number of historical and modern war theatres continue to attract visitors, marking a steady growth of battlefield tourism as one of the major categories of global tourism (Smith, 1998). As Smith states (1998: 206), ‘where there is a war, there is tourism’.

## 2 Battlefield Pilgrimages or Tourists?

A trip to war-related sites could have many different forms and tourists might experience it varyingly depending upon their expectations of and attitudes toward war-related sites. Additionally, they might interpret the meanings of sites visited differently. The battlefields and other artifacts associated with warfare have been drawing visitors to for many centuries (Baldwin & Sharpley, 2009). Lloyd (1998) identifies two significantly different groups, tourists and pilgrims, suggesting a dichotomy of motives in battlefield tourism. He emphasises a perception of the war which underlined respect to the sacrifice of the dead, perception of such places as sacred and the duty to remember the sacrifices of those fallen in the war. However, Mosse (1990) argues that the debate between the sacred and the profane toward the perception of the war might be the inevitable issue after WWI. He



emphasise that the pattern of tourists had changed from battlefield pilgrimage to battlefield tourism after WWI. During WWI and its aftermath, widows, orphans and families visited the battles sites where their relatives sacrificed their lives.

Traditionally, a journey for a pilgrimage means that people visit religious sites as part of religious tourism (Digance, 2003). However, the pattern of pilgrimages has changed from a religious ritual to a modern secular pilgrimage. Sites commemorating national tragedies and associated with legendary icons are now part of contemporary secular pilgrimage tourism (Collins-Kreiner, 2009; Hyde & Harman, 2011; Shuo, Ryan, & Liu, 2009). Baldwin and Sharpley (2009) describe battlefield pilgrimage as visits to graves and war memorials for remembrance and to grieve for the fallen. Battlefields can also develop into national symbols and mythical sites. A battlefield where soldiers have sacrificed their lives for the national cause is of major importance to not just their relatives, but to their compatriots also. The battles and their locations transcend the living memory and become part of the collective social memory in which the battles are re-created through a range of social procedures, memorials, warfare artefacts, souvenirs and part of the national ideology (Winter, 2009a, 2009b). Nostalgia is felt not just by the war-veterans but by casual visitors too. For many, battlefield pilgrimages are opportunities to reaffirm the sites importance for its military heritage and feel pride and loyalty through a collective social memory (Iles, 2008; Winter, 2009a) Even the second and third generation visitors are grief stricken and emotionally engaged while on a battlefield pilgrimage.

However, the post-war period saw a great number of tourists who had little or no connection to the fallen joining the battle tours run by tour operators (Lloyd, 1998). These visitors wanted their comforts, and the sacred meaning of the war was trivialised by the tourists and the commercialism they represented through the organised tours to those destinations (Lloyd, 1998; Mosse, 1990).

Battlefield tourists are likely to have varying and multiple motivations in visiting sites associated with warfare. They are also likely to be influenced by a range of motivators (Swarbrooke & Horner, 2007). Many researchers report that tourists visit sites of wars as pilgrimages to mourn and remember the relatives (Baldwin & Sharpley, 2009; Iles, 2008; Lloyd, 1998; Mosse, 1990; Scates, 2007; Winter, 2009a, 2011) or to identify themselves with the birth place of their nations (Hyde & Harman, 2011). Educational purposes are also dominant motivations for battlefield tourists (Baldwin & Sharpley, 2009; Henderson, 2000; Winter, 2009a, 2011). Though the sites of battlefields may be interpreted differently depending on the character of the sites, tourists are motivated by remembrance of the dead, educational purposes and curiosity. Ryan (2007) points out that war-related sources such as novels, television documentaries, war movies and games also may be motivators because they provide constant war-related information to tourists. Therefore, battlefield tourists or enthusiasts may also be interested in or motivated by other war-related cultural resources (Ryan, 2007; Smith, 1998). Ryan (2007) also focuses on the interpretation of the battlefields as mythic sites. If sites are recognised as symbols of defence of freedom, or are linked with patriotism or heroism, they may be classified as mythic sites (Ryan, 2007). Tourists might experience a feeling of

the mythic through their own beliefs and thoughts, which are socially contextualised.

No matter what the main motivator that pushes or pulls tourists to travel to war-related sites, tourists are influenced by multiple motivators and they have multiple purposes for visiting battlefield destinations (Swarbrooke & Horner, 2007). Henderson (2000) has noted how tourists to Vietnam often visit war-related sites for reasons of education and entertainment. Tourists may wish to experience something different during their holiday and also may want to obtain knowledge of the past with morbid curiosity. Some tourists visit war-related sites for leisure or because of their proximity to other attractions (Le & Pearce, 2011). Winter (2011) also notes how tourists visit WWI sites mainly for education and remembrance while enjoying other leisure activities such as shopping, dining and visits to other attractions.

The debate over the dichotomous nature of modern day visitations is an ongoing one (e.g., Collins-Kreiner, 2009; Lloyd, 1998, Winter, 2011). Attempts to differentiate between tourists and pilgrims blur the conceptualization of battlefield tourism, raising questions whether it is tourism or pilgrimage (Lloyd, 1998; Winter, 2011). Many researchers content that tourists mostly go on battlefield tours for educational purpose and remembrance (Baldwin & Sharpley, 2009; Henderson, 2000; Iles, 2008; Lloyd, 1998; Mosse, 1990; Scates, 2007; Winter, 2009a, 2009b). However, for many, battlefield visits involve leisure pursuits as well (Winter, 2011). The apparent de-differentiation of the two in battlefield tourism can be explained as a feature of the post-modernity (Collins-Kreiner, 2009). The boundaries are thus blurred and consequently, the meanings are modified. Iles (2008) argues that visitors who have no connection with past wars and the fallen may often realise themselves to be emotionally engaged to battlefield destinations. Winter (2011) notes that only a small proportion recognises themselves as pilgrims, while the majority identify themselves as tourists. A journey of secular pilgrimages, thus involves a hybrid set of activities with visitors going through mixed experiences (Shuo et al., 2009).

### 3 Easter Rising Rebellion

Ireland was ruled by the British since the twelfth century for approximately 800 years (Power, 1979). At the start of the twentieth century, Ireland consisted of four provinces of 'Leinster' (east), 'Munster' (south) 'Connacht' (west), and 'Ulster' (north). People in Ulster were mostly Protestants who were loyal to Britain. They supported the Unionist Irish political party. However, most of Irish were Catholic. Catholics supported the Nationalist party which had wanted to formulate Home Rule for Ireland (Power, 1979).

Between 1912 and 1914, there were serious disputes between the Nationalists and the Unionist over whether British Parliament was to initiate Home Rule for Ireland or not. The British parliament made a decision that Home Rule would not be

granted to Ireland until WWI finished. Most of Irish believed that once the war was over, Home Rule would begin for Ireland. However, there were skepticism all around about the British government's commitment to grant Home Rule (Power, 1979).

In 1916, the Irish Republic Brotherhood (IRB) determined to fight for their independence, rather than just taking Home Rule. The Nationalist Army, consisting of Irish Volunteers, also joined the fight for the freedom of Ireland (O'Brien & O'Brien, 1972; Power, 1979). On 24 April, Easter Monday, the leaders of the rebellion marched off up O'Connell Street in the centre of Dublin with Irish Citizen Army and they charged the General Post Office (GPO). They proclaimed the provisional government the 'Irish Republic' to the people of Ireland. However, the rising was over on 30 April and leaders of the rebellion surrendered to British Troops.

After the surrender, 16 leaders of rebellion were executed by British at the Kilmainham Gaol and 14 were buried at Arbour hill cemetery. Also some of leaders who fought for the struggle for independence after the rising were buried at Glasnevin cemetery (1916 Rebellion, 2014; O'Brien & O'Brien, 1972; Power, 1979). Before the rising, not many Irish supported the rebels. However, the executions and the rising inspired the whole of Ireland and Irish freedom movement became stronger and very popular (O'Brien & O'Brien, 1972; Power, 1979).

Now, GPO at O'Connell Street and Kilmainham Gaol are iconic sites to remember the 1916 Rising in Dublin (Heritage Ireland, 2013). Also the National Museum of Ireland, which is located in Collins Barracks which was a scene of fight during Easter Rising, and Glasnevin cemetery attract visitors as 1916 Easter Rising related sites (Glasnevin Trust, 2014; National Museum of Ireland, 2014). Moreover, '1916 Rebellion walking tour' and 'Historical walking tours of Dublin' guide visitors to the 1916 Rising related sites every day (Historical Walking Tour of Dublin, 2014; 1916 Rebellion, 2014).

## 4 Research Methods

Sites related to Easter Rising rebellion are located across Dublin city. Among a number of sites managed as places of visitor attractions, first two sites were temporarily selected for the study. They were Kilmainham Gaol and Arbour Hill cemetery. However, due to the lack of a number of visitors at Arbour hill cemetery, this site was rejected after a pilot study. Instead the Easter Rising exhibition in National Museum of Ireland and the 1916 Rebellion Walking Tour were added to conduct the research survey. The National Museum of Ireland, Decorative Art and History is located in Collins Barracks which is the oldest military Barracks in Ireland. In the museum, there is a commemorative exhibition 'the Easter Rising Understanding' for the 90th Anniversary of the Easter Rising. Significantly, there is an original copy of the Proclamation of the Republic, as read outside of the General Post Office occupies in the exhibition. Also the museum exhibits 'Soldiers and

Chiefs: the Irish at war at Home and Abroad, from 1550' (National Museum of Ireland, 2014).

Kilmainham Gaol is a meaningful site in Irish history as many leaders of Irish rebellions were detained and some executed by the British during the period of the struggle for the independence from Britain. The leaders of Easter Rising rebellion were imprisoned and executed after the rising. Now this jail is open to the public as a museum and it is one of the popular visitor attractions in Dublin. The 1916 Rebellion Walking Tour was founded in 1996 by an Irish historian. This tour visits historical Easter Rising related sites in the Dublin city centre with a guided escort. This half day tour was used to conduct the questionnaire survey among the tour group.

A questionnaire consisting of 29 self-completing questions was designed to find out tourists' motivations for engaging in battlefield tourism in Easter Rising sites and the relationship between their motivations and background. The questionnaire was distributed among randomly selected visitors in the three sites. Out of a total of 197 questionnaires distributed, 161 were completed and returned in useable form, providing a response rate of 82 %. Data analysis was carried out using the Statistical Package for the Social Sciences (SPSS) software. Before the analysis responses were coded numerically, labeled, and added values as necessary. Descriptive-statistical analysis was carried out to summarise the data. Answers questions inviting respondents to describe themselves (part two) were ranked according to the frequency. Responses to the 20 motivational statements were analysed to identify their mean scores.

## 5 Findings

The socio-demographic profiles of Easter Rising tourists are shown in Table 1. Irish (44.1 %) made up almost half of the total sample, European (23.0 %), American (13.7 %), British (12.4 %) and the remaining 6.9 % comprising of three people from Australia and New Zealand and eight people from other countries. For the total sample, 14.9 % of the participants had Irish ancestral link while 45.3 % of the participants were Irish and 39.8 % of people had no connection with Ireland. The reason why the total percentage of Irish nationality and the total percentage of Irish are not equal is because two tourists were from Northern Ireland. They identified themselves as Irish.

Approximately half (43.5 %) of the participants were aged between 18 to 29 years and 59.0 % had at least a college/university degree. The total samples of 57.8 % had already visited Easter Rising related sites before and 34.7 % of the participants were likely to visit the other Easter Rising related sites in a future.

For the question of self-assessed tourists' type, a number of participants described themselves as 'a tourist who is travelling around in Ireland' (36.0 %), 'local visitor' (25.5 %), 'day tripper' (14.3 %) and 'an individual tourist' (11.2 %).

**Table 1** Profile of the sample (N = 161)

Frequency (%)	Frequency (%)
Nationality	Age group
Ireland 71 (44.1 %)	18–29 years 70 (43.5 %)
Europe 37 (23.0 %)	30–39 years 29 (18.0 %)
USA 22 (13.7 %)	40–49 years 23 (14.3 %)
UK 20 (12.4 %)	50–59 years 24 (14.9 %)
Australasia 3 (1.9 %)	60 years over 15 (9.3 %)
Others 8 (5.0 %)	Educational level
Irish family link	Secondary education 26 (16.1 %)
Irish 73 (45.3 %)	College/University 95 (59.0 %)
Irish ancestral links 24 (14.9 %)	Post-graduate 35 (21.7 %)
No links 64 (39.8 %)	Others 5 (3.1 %)
Gender	Have you visited Easter Rising related sites
Male 89 (55.3 %)	Yes 68 (42.2 %)
Female 72 (44.7 %)	No 93 (57.8 %)
	Will you visit Easter Rising related site
	Yes 56 (34.8 %)
	No 105 (65.2 %)

**Table 2** Tourists type (self-assessed) (N = 161)

		Frequency	Percent
	I am a pilgrim who visits Irish sacred historical sites	3	1.9
	I am a pilgrim but also tourist	2	1.2
	I am a battlefield tourist who loves visiting war-related sites	2	1.2
	I am not a huge fan of battlefield but I am interested	4	2.5
	I am a tourists who is travelling in Ireland	58	36.0
	I am a day tripper	23	14.3
	I am a group tourists	2	1.2
	I am a individual tourist	18	11.2
	I am a local visitor	41	25.5
	Others	5	3.1
	Total	158	98.1
Missing	System	3	1.9
Total		161	100.0

Only 1.9 % of the participants described themselves as ‘a pilgrim’ and ‘battlefield tourists’ (1.2 %), ‘a pilgrim but also tourist’ (1.2 %) (see Table 2).

Table 3 shows the mean score for 20 motivational statements. The most highly rated statements are “Because of historical interest” (mean = 4.38), “Because I want to know about Ireland” (mean = 4.34), “To enjoy a holiday/day out” (mean = 4.14) and “To experience the authentic sites where important events occurred” (mean = 4.03). The most poorly rated statements are “Because I had personal link with this site (or sites)” (mean = 2.35), “Because of morbid curiosity” (mean = 2.17) and “This is a spiritual pilgrimage” (mean = 2.10).

**Table 3** Descriptive statistics of motivation statements

	N	Mean	Std. Deviation
Because of historical interest	161	4.38	0.806
Because I want to know about Ireland	160	4.34	0.753
To enjoy a holiday/day out	160	4.14	0.853
To experience the authentic sites where important events occurred	161	4.03	0.965
To have a good time with friends/family	161	3.90	1.108
To learn more about Easter Rising	161	3.88	1.244
To see the war artefacts	157	3.36	1.220
Because information sources (people, internet, guide books) recommend	160	3.33	1.291
To pay respects people who died for Ireland's freedom	161	3.23	1.347
To understand about my heritage	161	3.23	1.582
To connect with my country and birth place	159	3.13	1.603
Because I am interested in war-related cultural genre	161	3.06	1.243
Because I am interested in battlefield tourism	159	2.99	1.175
To see the sites of conflicts and death	159	2.82	1.334
Because it is near other visitor attractions	159	2.63	1.271
Because it is near Hop-on Hop-off or other buses stop	156	2.47	1.351
Because I am interested in places of atrocity	161	2.43	1.327
Because I had personal link with this site (or sites)	158	2.35	1.321
Because of morbid curiosity	159	2.17	1.218
This is a spiritual pilgrimage	158	2.10	1.147

*Note:* 1 = strongly disagree, 2 = disagree, 3 = neither agree nor disagree, 4 = agree, 5 = strongly agree

This overall results of descriptive statistic shows that most of the sample tended to visit Easter Rising related sites to obtain knowledge of history and Ireland. However, they wanted to enjoy their holiday as well. The majority of the sample preferred to describe themselves as a tourist or a visitor rather than a pilgrim or a battlefield tourist.

## 6 Discussion and Conclusion

This study of tourists visiting sites where a historical rebellion happened in Dublin has illustrated the complications of examining battlefield tourists. In the aftermath of WWI, visits to the battlefield were likely to be classified within a dichotomy concept between pilgrims and tourists (Lloyd, 1998; Seaton, 1999; Winter, 2011). Those who visited the sites of the battle to mourn and remember the fallen were identified as pilgrims (Lloyd, 1998). Those who visited the battles to look at the land of death with curiosity were identified as tourists (Seaton, 1999). Tourists

needed their comfort, and souvenirs and snacks were sold in the land of the battle (Mosse, 1990).

However, as Cohen (2004) points out, tourism is a vague theory, and the boundaries between tourists and non-tourists or pilgrims and tourists have become blurred and unclear. Although tourists visit the battlefields as secular pilgrimages, it implies hybrid activities, and experiences depend on individuals' expectations and motivations (Seaton & Lennon, 2004; Shuo et al., 2009).

This study analysed the motivations and characteristics of visitors to Easter Rising related sites, to investigate whether they could be categorised into dichotomy concept between pilgrims and tourists. The result of Table 2 demonstrates that the dichotomy concept to visitors to Easter Rising sites is not feasible. Whether it considers the dichotomy concept or not, the majority of tourists did not assess themselves as pilgrims. Only 1.9 % of the total sample classified themselves as a pilgrim and 1.2 % of the total responded as a pilgrim but also tourist.

The greater number of participants assessed themselves as tourists, day trippers and local visitors. This result demonstrates that most tourists to Easter Rising sites could be described as tourists. Moreover, visiting to Easter Rising sites might not be their only reason to visit Dublin and Easter Rising sites might play an insignificant role in their decision to visit the Irish capital (Le & Pearce, 2011).

Le and Pearce (2011:461) discuss their research of battlefield tourists to Vietnam which suggested that battlefield tourists could be more suitably expressed as 'Battlefield visitors for a day' rather than 'Battlefield visitors to Vietnam'. Similarly, visitors to Easter Rising sites responded highly on the 'Holiday' and 'Educational purpose' factors than the 'Pilgrim and identity' and 'Battlefield interest' factors. Not surprisingly, most participants did not identify themselves as a battlefield tourist either. Only 1.2 % of the total sample identified themselves as a battlefield tourist.

Future study is also required to compare motivations in other battlefields and sites of conflicts. As the nature of wars are different, it would be worthwhile to study how the motivations will change depend on sites and ideologies. It would be also interesting to explore how each individual has deep experiences and how they are engaged with sites emotionally depending on their personal backgrounds and the level of understanding with qualitative research approaches.

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# A Strategic Policy Scenario Analysis Framework for the Sustainable Tourist Development of Peripheral Small Island Areas

A. Stratigea and V. Katsoni

**Abstract** The focus of the present paper is on the sustainable tourist development of peripheral small island regions, setting as an example an island from the Greek territory disposing such attributes, the island of Lefkada. The proposed planning framework is supported by foresight and participatory evaluation tools, aiming at structuring and evaluating sustainable future tourist development scenarios, in order to conclude with the most challenging future options.

**Keywords** Peripheral small island regions • Sustainable tourist development • Spatial planning • Scenarios • Policy

**JEL Classification** Z3 • O2

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## 1 Introduction

*Sustainable tourist development* has nowadays been set at the epicentre of local policies in tourist developed areas, in an effort to both reap the economic benefits of tourist development but also manage local resources in such a way that cultural integrity, essential ecological processes, biological diversity and life support systems are maintained.

*Peripheral small island regions* are nowadays perceived as attractive *tourist destinations* at a global scale, while the number of such regions that are making consistent efforts to enter the tourist market is steadily increasing (Logossah, Fortuna, Maupertuis, & Salmon, 2004). Although small island regions are exhibiting certain *weaknesses* as to their development perspectives in comparison to hinterland (Spilanis, 2012), experience shows that an important part of Small Island Tourism Economies (SITE) (Giannoni & Maupertuis, 2007) are successful from an economic point of view. This is largely based on their exceptional natural and cultural resources, whose tourist exploitation forms the core of policy decisions for solving small islands' challenging development problems (Crusol, Hein, Ph, & Vellas, 1989).

Coping with risks inherent to *unsustainable development paths* of small island regions, calls for a more *integrated development approach*, seeking a low ecological footprint tourist development pattern and a better integration of the tourist sector in the local economic structure for a 'fair' benefit sharing by the local society. Moreover, it calls for a rather *long term approach* for meeting present but also future generations' needs. These requests are intensifying the interest in foresight initiatives at the regional/local level, placing foresight exercises at the core of decision-making processes where, by taking advantage of the strengths and opportunities of such peripheral small island regions in a sustainable development context, more knowledgeable, integrated, coherent and well structured policies can be implemented and a more qualitative and hopeful future for their population can be created.

Based on the above discussion, the *focus* of the present paper is on the development of a *strategic policy scenario analysis framework*, supporting an integrated planning approach of *peripheral small island regions*, with particular emphasis on alternative tourist development paths, which can be used as a 'vehicle' so as sustainability objectives to be reached. This framework is implemented to a peripheral small island region, the island of Lefkada-Greece. The proposed planning framework is supported by foresight and participatory evaluation tools, aiming at structuring and evaluating sustainable future tourist development scenarios, in order to conclude with the most challenging future options.

## 2 The Methodological Approach

The methodological approach consists of the following *five steps* (Fig. 1):

- *Step 1: goal setting*—sustainable tourist development of the study region—together with a number of *objectives* that fall into this particular goal.
- *Step 2: exploration of the external environment* in order to identify the context, within which policy decisions regarding the development of the tourist sector in the specific case study will be made.
- *Step 3: study of the internal environment* aiming at exploring the general attributes of the study region, the current state of the tourist sector, etc.
- *Step 4: structuring of scenarios* for the sustainable tourist development of the study region, placing emphasis on the spatial pattern of tourist development, in an effort to seek a compromise between the development of the tourist sector and the need to protect the valuable ecosystems of the region; achieve a more spatially-balanced development of the tourist sector; and adjust to challenges of the external decision environment.
- *Step 5: participatory evaluation* of future tourist development scenarios for the region at hand, carried out by use of the NAIADE multicriteria evaluation model that supports scenarios’ prioritization from local stakeholders.

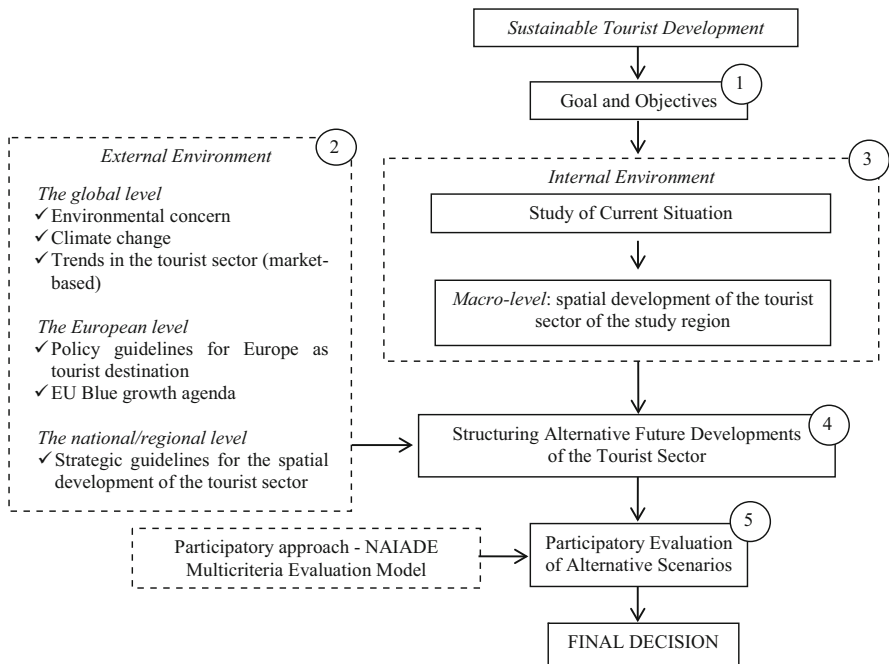


Fig. 1 The methodological framework. Source: Stratigea and Katsoni (2015)

In the following, the application of the above policy analysis framework in the specific Greek peripheral small island region—the island of Lefkada—is presented.

### 3 Key Elements of the External Environment

This section aims at grasping key drivers of the external environment (see Fig. 1) which will, to a certain extent, *frame* decision-making on the future development of the tourist sector in the specific case study.

#### 3.1 *The Global Context*

In searching of a sustainable future tourist development perspective of peripheral small island regions, certain *key challenges* emerge from the external environment (see Fig. 1), which are shortly presented in the following:

- Environmental concern

The *environmental impacts* of tourist development are extremely important, since an unsustainable pattern that exceeds *carrying capacity* of a destination, particularly of a small island region, can largely degrade the natural and built environment. Key elements that should be taken into account in the planning exercise are: depletion of natural resources, air pollution and noise, solid waste and littering, sewage pollution, aesthetic pollution, and physical impacts, relating to the degradation of fragile ecosystems by tourism-related activities and infrastructures as well as the long-term structural changes taking place in the natural and built environment of a destination.

- Climate change

Tourism is a highly *climate-sensitive* economic sector. Climate change can affect all types of tourist activities and destinations, while climate change impacts seem to be more pervasive in coastal and island tourist destinations. Moreover, high vulnerability of these regions often couples with a low adaptive capacity, especially in developing countries. Coping with climate change impacts implies the urgent need for coherent policy strategies that can build a truly sustainable tourism model.

- Trends in the tourist sector

*Key trends* appearing nowadays in the sector are driven by both the increasing environmental awareness and the huge developments in the Information and Communication Technologies (ICTs) sector. The mainstream of these trends refer to the *demand* and *supply* but also the *destination* side.

On the *demand side*: a persisting trend appears towards more ‘*demanding*’ consumers, increasingly seeking a completely diversified *tourist experience* that is, based on their preferences, furthermore personalized. Tourists nowadays

appear as ‘mature consumers’, i.e., more experienced, sophisticated, educated, knowledgeable and demanding, independent, flexible, more ‘green-oriented’ (Stratigea & Hatzichristos, 2011), while they are motivated by a desire to ‘*experience and learn*’, thus increasingly seeking *new, meaningful and authentic experiences* (Park, Nam, & Shi, 2006; Stratigea & Hatzichristos, 2011).

On the *supply side*: the exploitation of ICTs and their applications is nowadays critical for the tourism industry so as to achieve competitive advantage and provide economic benefits for localities. Tourist stakeholders strive to gain competitive advantages in rapidly changing marketplaces (Katsoni, 2012; Katsoni & Venetsanopoulou, 2013) and meet the demand for promoting a *uniform and complete tourist experience* (Katsoni, 2014), while they make an effort to respond to the demand for environmentally-committed tourist businesses and products (Stratigea & Giaoutzi, 2006).

On the *destination side*: the changing characteristics of the tourist market call for the development of *new products and services* for meeting newly emerging *special interest markets* (Dwyer et al., 2008). This can potentially influence, among others, the *destinations’ management and marketing* that have also been largely affected by developments of *information technology and social media*, increasing competition among destinations but also strengthening of the potential of remote and peripheral regions to ambitiously enter the tourist market (Stratigea & Hatzichristos, 2011; Stratigea, Papakonstantinou, & Giaoutzi, 2008).

### 3.2 The EU Context: Tourist Policy Guidelines

Europe constitutes a very attractive tourist destination at a global scale, based on the quality and diversity of natural and cultural resources. In order to take advantage of these resources, a *new political framework* for the *sustainable tourist development of the European territory* has been set that aims at strengthening the position of Europe as a global tourist destination [COM(2010)352]. This goal is confronted with a number of *challenges*, such as [COM(2010)352]: increasing global competition, changing demographic pattern in Europe, constraints linked to climate change, climate change impacts, scarcity of resources, pressure on biodiversity, risks regarding the cultural heritage posed by mass tourism, challenges determined by the particular characteristics of the European tourist sector linked to both consumer and production models.

To compete at the global scene, *quality* of local European tourist destinations needs to be assured, which addresses the need for an integrated approach, keeping balance among all three sustainability pillars; while it also implies the setting of appropriate public policies, targeting the sustainable management of destinations, the integration of sustainability concerns into tourist businesses and the promotion of tourists’ sustainability awareness.

One also important European initiative is presented by the Communication [COM(2012) 494] on the '*Blue Growth opportunities for marine and maritime sustainable growth*', where the importance of sea and coasts as drivers of a new perspective of the economy—the *blue economy*, is stressed. Along this rationale, maritime, coastal and cruise tourism constitute one of the blue growth focus areas, where emphasis is given on coastal and open-water recreation activities.

### **3.3 *The National/Regional Context: Tourist Policy Guidelines***

Future tourist development of the island of Lefkada has to take into consideration strategic directions for the tourist sector that are set at the national and regional policy level.

At the *national level*, strategic directions are drawn by the Special Framework for Regional Planning and Sustainable Development of the Tourist Sector (SF-T, 2009), targeting a diversified, more spatially-balanced and sustainable tourist development. Based on the SF-T, the Region of the Ionian Islands in general, and Lefkada island (study region) in particular, exhibit certain *comparative advantages*, emanating from the: central position in the Adriatic-Ionian Sea; upgraded ports network that can assure accessibility; valuable cultural and natural environment that can steer highly qualitative alternative forms of tourist development; and high potential to expand their area of influence by connecting to large sea transport routes. According to SF-T, the *island of Lefkada* falls within a specific group of Greek islands, for which emphasis is placed on the development of a balanced sectoral structure, based on tourism but also the rest of local economic sectors, on the grounds of resource availability.

At the *regional level*, priorities set for the *Region of Ionian Islands*, in which Lefkada Island belongs, are set for the time span 2007–2013 and prolonged for 2014–2020, stressing the importance of (Stratigea & Katsoni, 2015):

- a qualitative development of the tourist sector, based on the distinguished cultural resources of the Ionian islands,
- an innovative/qualitative and environmentally-friendly agricultural production,
- upgraded of tourist infrastructures and certification of tourist services, and finally
- training of human resources for improving skills on tourist services.

## 4 The Internal Environment

The island of Lefkada belongs to the Heptanese cluster of Ionian Islands, forming a complex of islands together with Kastos and Kalamos, constituting the municipality of Lefkada. It is endowed with valuable natural resources (biodiversity, mountainous part, NATURA regions, caves etc.); while a wide variety of cultural resources (archaeological and historical sites, local traditions and architecture, etc.) are formatting the specific *'place identity'* of the island.

The local economic structure of Lefkada island is marked by the continuously declining trajectory of the primary sector; the more or less stabilized trajectory of the secondary sector; while the tertiary sector rates first, mainly due to the prevalence of the tourist sector but also the tertiarization trend of the local economy in general.

The *tourist sector* is mainly characterized by a *mass pattern* which, based on the rapid tourist development during the last few decades, has driven the weathering of the built and natural environment, the irrational use of local resources but also the intensification of land use conflicts in the island.

The *tourist supply* is mostly concentrated in the eastern coastal part of Lefkada, where the main body of hotel infrastructures and rooms to let are located. The emphasis placed on the tourist sector has resulted in a certain increase of hosting infrastructures (hotels and family-run rooms to let) during the last few years, resulting in a significant environmental degradation but also in conflicts against other sectors' interests. The low class level of the majority of these infrastructures reflects the low budget tourist flows attracted in the area.

As to the *demand side*, a steadily increasing number of tourist flows is noticed during the last years. The study of domestic and foreign flows shows the prevalence of *domestic flows* in the study area, while foreign flows exhibit a slight decrease (Katopodi, 2014).

## 5 Structuring and Evaluating Scenarios for the Sustainable Future Tourist Development of Lefkada Island

Planning the sustainable tourist development implies the need to create a meaningful *balance* among different stakes so that the planning outcome responds to the needs and expectations of various stakeholders' groups (Stratigea et al., 2008); while keeping in track with sustainability objectives. Such a multi-objective balance is sought in the following, by means of structuring and evaluating alternative scenarios for the sustainable tourist development of Lefkada Island, taking also into consideration ongoing trends of the external and internal environment (Lefkada island) (see Fig. 1).

## 5.1 Goal and Objectives

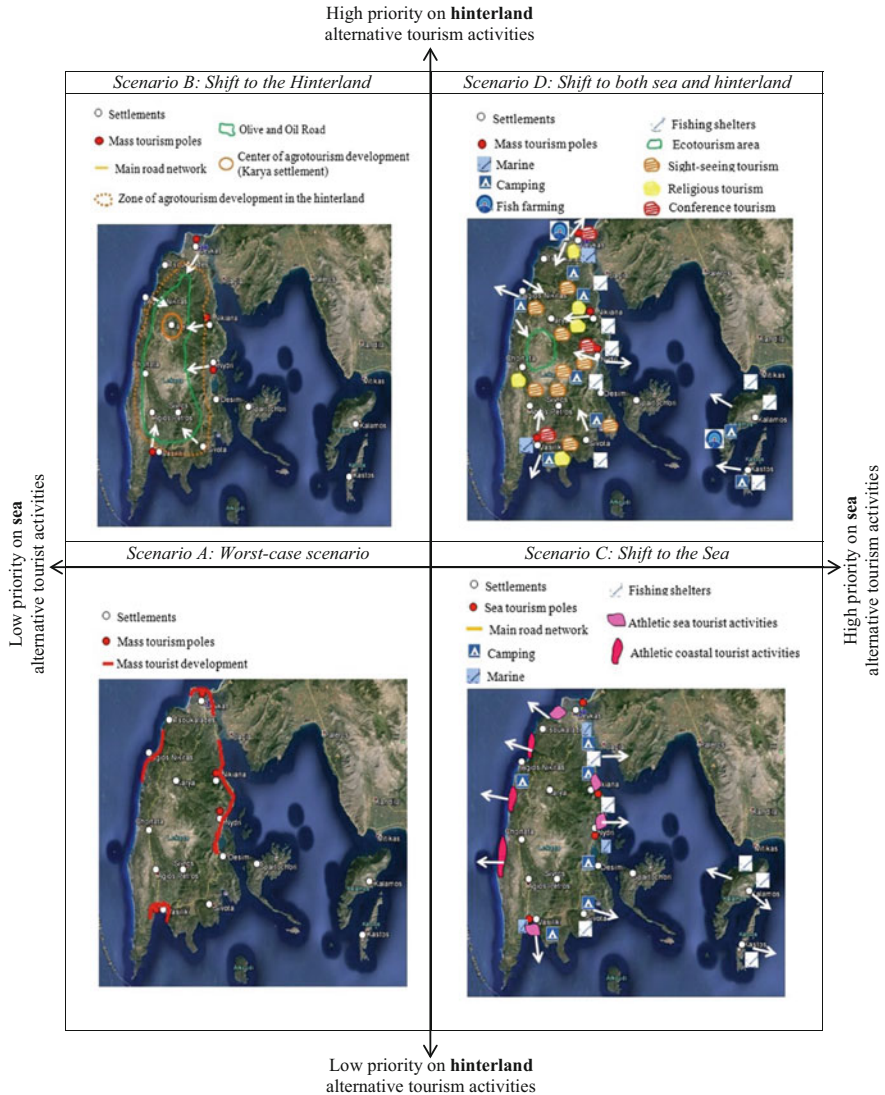
As *goal* of the planning exercise is defined the sustainable future development of the tourist sector in the island of Lefkada, demarcated as an environmentally-responsible, socially-cohesive, economically-competitive and spatially-balanced sector, smoothly integrating into the local economic structure. This goal is further analyzed into the following *objectives*:

- Restraining of *population decline* in local settlements, hampering a balanced population distribution and a multi-sectoral development perspective of the study region (Katopodi, 2014; SF-T, 2009).
- Increasing *interaction* of tourist with other economic sectors, where development of the primary and secondary sector will both serve the needs of the tourist sector and set the ground for settling a range of alternative tourist activities e.g., agro-tourism (Katopodi, 2014; SF-T, 2009).
- *De-concentrated spatial pattern* of tourist development, implying a shift from the current unsustainable pattern of mainly mass tourist development to a de-concentrated spatial pattern, rating at a high position alternative tourist activities (Katopodi, 2014; SF-T, 2009).
- Upgrading of *tourist accommodation infrastructures* in quantitative, qualitative and energy-efficiency terms, supporting an environmentally-responsible pattern of tourist accommodation deployment (Giaoutzi, Dionelis, & Stratigea, 2008; SF-T, 2009).
- Upgrading of *transport and telecommunications networks* for providing unimpeded access of tourist flows both in physical and electronic terms (Giaoutzi et al., 2008; Stratigea, 2011).
- Upgrading of *human resources* for stepping up of labour skills in respect of all kinds of economic activities, with particular emphasis on skills relating to the tourist sector (Katopodi, 2014; SF-T, 2009).

## 5.2 Structuring of Alternative Scenarios

From the set of available scenario building methodologies, the 'two uncertainty axes' scenario building process was applied to the specific foresight exercise (Jäger, Rothman, Anastasi, Kartha, van Notten, 2007). The two uncertainty axes used in this respect refer to: (a) a horizontal axis delineating a *diversifying emphasis on coastal and maritime alternative tourist activities* (based on the 'blue growth' perspective of the tourist sector); and (b) a vertical axis, expressing a *diversifying emphasis on alternative tourism activities* taking place in the *hinterland* (based on the 'green growth' perspective of the sector). These two policy directions ('green' and 'blue' growth) are considered by the research team as crucial for coping with challenges of the external environment, while they can create a proper internal environment for reaching goal and objectives set for the region at hand.





**Fig. 2** Future tourist development scenarios based on the two uncertainty axes—Lefkada island. Source: Stratigea and Katsoni (2015)

Four qualitative, normative, contrasting, well differentiated future scenarios are structured in this respect, placing *emphasis* on the: promotion of an *alternative tourist model*, which aims at coping with current sustainability threats; and the structuring of a more *spatially balanced* tourist development. Both are presented in all three scenarios apart from scenario A (worst-case or BAU scenario). These have as follows (see Fig. 2):

– *Scenario A: Worst case scenario (BAU)*

This scenario is emerging from the extrapolation of past/current trends, representing a *low level of exploitation of green and blue growth perspectives* of the tourist sector. The *mass tourist model* is prevailing in the local economy. The share of primary and secondary sector of the local economic structure is steadily declining, threatening stability and competitiveness of the local economy. Due to the dominant low environmentally-friendly culture, natural and cultural resources are gradually deteriorating, thus jeopardizing the comparative advantage upon which the tourist product is based. Quality of tourist flows is downgraded, threatening the sector's long term flourishing. The island's high dependence on the tourist sector increases vulnerability of the local economy to external threats, while the mass tourist model weakens the potential for grasping new global market opportunities (e.g., qualitative environmentally-committed tourist demand).

– *Scenario B: Shift to the hinterland—'Green' tourist development*

This scenario aims at the sustainable exploitation of natural and cultural resources met in the island's hinterland—*'green' growth perspective*—placing environmentally-friendly tourist activities at a high level. The mass tourism model of the coastal part remains stable, with a shift towards more qualitative tourist flows and 'greening' of tourist infrastructures and services. A settlements' alternative tourist development network is created in the hinterland. Local traditions, culture, gastronomy, agriculture, small scale manufacturing, traditional settlements, natural resources of the mountainous part, local products, etc. constitute the core of alternative tourism strategy, strongly connected with the mass coastal tourist poles for reaping the benefits of tourist flows and diffusing local identity values and local products. The green spirit is permeating the primary and secondary sector, exercised by green practices and technologies as well as traditional ways of production. Unimpeded transport movement between seaside and the hinterland is ensured, for further diffusing values and local quality, and spreading services and products of the hinterland to the coastal part.

– *Scenario C: Shift to the sea—'Blue' tourist development*

Following the *'blue growth' tourist development perspective*, Lefkada as a tourist destination in this scenario is broadly determined by athletic/sport sea activities in the coastal part, accomplished by the development of a range of athletic/sport coastal poles, taking advantage of seaside areas, marine network developed in the island, sea caves and coastal configuration, weather conditions (winds) etc. Mass tourism model is restrained, taking also steps towards a more environmentally-friendly tourist business management. *Environmental culture prevails*, leading to the development of a range of environmentally-friendly tourist activities. As such can be referred coastal athletic activities, diving, sea canoe-kayak, kite surf, wind surf, water skiing, yachting/sailing activities etc. Accommodation infrastructures of low nuisance are deployed in Kastos and Kalamos, the two small islands administratively belonging to Lefkada municipality. Lefkada becomes an environmentally-committed *athletic/sport centre* for

professional and amateur sport groups and a pole for the organization of national and international coastal and sea athletic events and activities.

- *Scenario D: Shift to both sea and hinterland—Combined ‘green’ and ‘blue’ direction*

This scenario aims at the development of both coastal/maritime alternative tourist activities and alternative tourist activities in the hinterland—*combination of blue and green perspective*. A high environmentally-friendly culture is prevailing in all sectors. The tourist sector is highly integrated with the rest economic sectors, which by adjusting to the environmentally-friendly spirit, places emphasis on the low ecological footprint of local traditional primary and secondary production. Sustainable exploitation of local natural and cultural resources have led to a rich tourist product, combining coastal and maritime tourist activities with cultural and religious tourism, agro-tourism, gastronomy tourism, wine tourism, etc. As a result, a more spatially-balanced tourist development is achieved, motivating local stakeholders and population, keeping alive local traditions and culture, strengthening isolated regions of the island and providing the highest integration among local economic sectors; and a promising future for employment and income support as well diversification of the local economy, better responding to external risks that can threaten all sectors of the local economy.

### 5.3 Participatory Evaluation of Alternative Scenarios

It is commonly accepted that in order sustainable tourism development in a specific destination to be achieved, an inclusive, strategic and long term oriented planning approach is necessary (Simpson, 2001; Stratigea & Papadopoulou, 2013), seeking *consensus* among local stakeholders on the selection of the most desired future direction. Towards this end, the evaluation of the four previously described scenarios (Fig. 2) is carried out in the following, based on: (a) a participatory approach involving local stakeholders; and (b) the use of the NIADE multicriteria evaluation model (Munda, 1995), dealing with qualitatively expressed views of local stakeholders as to the scenarios, entering the evaluation stage (see also Stratigea & Papadopoulou, 2013).

#### 5.3.1 The NIADE Multicriteria Evaluation Method

Novel Approach to Imprecise Assessment and Decision Environments (NIADE) is a discrete multicriteria evaluation tool, suitable for planning problems characterized by high uncertainty and complexity as to existing spatial, social and economic structures and respective interrelationships among them (Munda, 2006). The model deals with both quantitative and qualitative data. The basic input to NIADE model is: (a) the set of alternative scenarios to be evaluated;

**Table 1** Evaluation criteria

a/a	Domain	Evaluation criteria
K1	Environment	Level of sustainable exploitation of natural and cultural resources
K2		Level of vulnerable ecosystems' protection
K3	Economy	Level of new employment expected
K4		Promotion of local products—level of interaction of the tourist sector with the rest of the local economic sectors
K5		Level of alternative tourism development
K6	Society	Level of social and economic cohesion created
K7		Level of population restraint
K8		Level of awareness raising in the local society (business and societal level)
K9	Spatial pattern	Level of spatially balanced development of the tourist sector
K10	Tourist accommodation infrastructures	Level of environmental culture permeating tourist businesses—Ecological footprint of tourist businesses

Source: Stratigea and Katsoni (2015)

(b) a number of decision criteria for their evaluation; and (c) a number of stakeholders, who express judgments with respect to the scenarios at hand. Based on this input, are carried out (NAIADE, 1996):

- a *multicriteria analysis*, which results in the prioritization of alternative scenarios as to a set of evaluation criteria; and
- an *equity analysis*, which explores the level of agreement among the different interests (stakeholders) as to the prioritization of alternative scenarios emerging from the previous step, and possible ‘alliances’ or ‘conflicts’ among stakeholders as to these particular scenarios.

### 5.3.2 Application of the NAI ADE Model

The application of the NAI ADE model for the Lefkada case study is based on the following *qualitative data input*: (a) the previously presented four discrete *scenarios*; (b) a set of ten *evaluation criteria*, emanating from goal and objectives set (Table 1); (c) the *impact matrix*, presenting the performance of each scenario as to the evaluation criteria concerned (Table 2); (d) the *equity matrix*, presenting the views of recruited local stakeholders as to the scenarios concerned (Table 3) (for more details see Stratigea & Katsoni, 2015).

- (a) *Data input*
- (b) *Empirical results*

The empirical results obtained from the *multicriteria analysis* (Fig. 3) indicate that the most prevailing scenarios are Scenario B (‘Shift to the hinterland’) and Scenario D (‘Shift to both sea and hinterland’), which are almost equivalent as to

**Table 2** Impact matrix

	Evaluation criteria	Scenario				
		Scenario A Worst-case scenario	Scenario B Shift to hinterland	Scenario C Shift to sea	Scenario D Shift to both sea and hinterland	
Domain	Environment	K1	Very bad	Good	Moderate	Perfect
		K2	More or Less bad	More or less good	Very good	Moderate
	Economy	K3	Very bad	Good	Moderate	Perfect
		K4	Very bad	Perfect	More or less bad	Perfect
		K5	Very bad	Good	Moderate	Perfect
	Society	K6	Bad	Very good	More or less bad	Perfect
		K7	Bad	Perfect	More or less bad	Very good
		K8	Extremely bad	Perfect	Moderate	Very good
	Spatial pattern	K9	Very bad	Very good	More or less bad	Perfect
	Hosting infrastructures	K10	Bad	Very good	Moderate	Perfect

Source: [Stratigea and Katsoni \(2015\)](#)**Table 3** Equity matrix

		Scenario			
		Scenario A 'Worst-case scenario'	Scenario B 'Shift to the hinterland'	Scenario C 'Shift to the sea'	Scenario D 'Shift to both sea and hinterland'
Agricultural representatives	G1	Bad	Perfect	Moderate	Very good
Manufacturing representatives	G2	Bad	Perfect	Moderate	Very good
Tourism representatives	G3	Moderate	Moderate	Very good	Perfect
Local administration	G4	Very bad	Very good	Good	Perfect
Cultural association	G5	Very bad	Perfect	Good	Very good
Environmental association	G6	Very bad	Perfect	Very good	Good
Local population representatives	G7	Very bad	Perfect	Moderate	Very good

Source: [Stratigea and Katsoni \(2015\)](#)

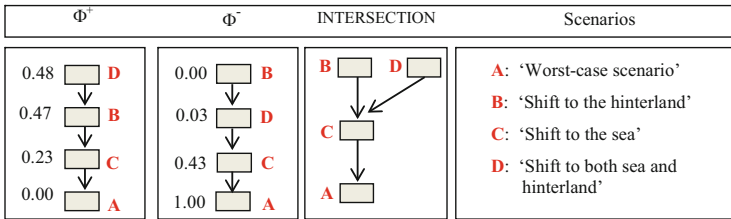


Fig. 3 Results of multicriteria analysis. Source: Stratigea and Katsoni (2015)

Table 4 Similarity matrix

$G_i$		$G_j$						
		$G_1$	$G_2$	$G_3$	$G_4$	$G_5$	$G_6$	$G_7$
Agricultural representatives	$G_1$	1.0000	0.8936	0.5722	0.7372	0.7396	0.6624	0.8460
Manufacturing representatives	$G_2$	0.8936	1.0000	0.5722	0.7372	0.7396	0.6624	0.8460
Tourism representatives	$G_3$	0.5722	0.5722	1.0000	0.5998	0.5888	0.5853	0.5496
Local administration	$G_4$	0.7372	0.7372	0.5998	1.0000	0.9014	0.7926	0.7706
Cultural association	$G_5$	0.7396	0.7396	0.5888	0.9014	1.0000	0.8155	0.7739
Environmental association	$G_6$	0.6624	0.6624	0.5853	0.7926	0.8155	1.0000	0.6734
Local population representatives	$G_7$	0.8460	0.8460	0.5496	0.7706	0.7739	0.6734	1.0000

Source: Stratigea and Katsoni (2015)

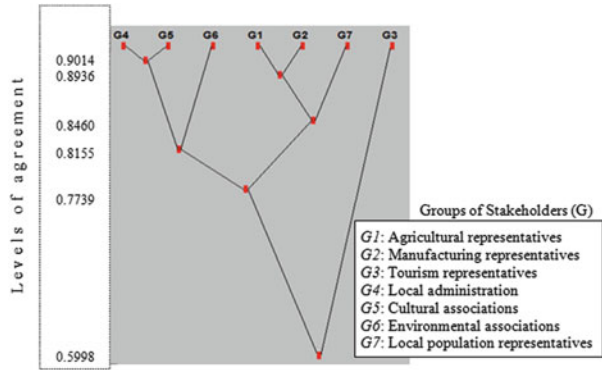
their performance. Next in rating comes Scenario C ('Shift to the sea'), while last rates Scenario A ('Worst-case scenario').

The empirical results emanating from the *equity analysis* are presented in Table 4, showing the degree of judgments' similarity of each pair of stakeholders' groups (i, j).

The results obtained from the *equity analysis* are used to explore potential 'alliances' or 'conflicts' among stakeholders' judgments on scenarios' prioritization. According to these results it is quite evident that the highest level of coalition, appears between cultural associations and local administration (0.9014), next follows the coalition of manufacturing and agricultural representatives (0.8936), while tourism representatives seem to rather early differentiate their position as to the scenarios concerned (agreement with the rest of stakeholders at the lowest rate of agreement -0.5998) (see Table 4 and Fig. 4).

In Table 5 coalitions created at the highest level of agreement (0.9014) (see Fig. 4) together with the rating of scenarios of each specific group at this level are presented. These are clearly depicting the preference of Scenario B ('Shift to the

**Fig. 4** Dendrogram representing the process of alliances' formation. Source: Stratigea and Katsoni (2015)



**Table 5** Coalitions at the highest level of agreement (0.9014)

{G <sub>5</sub> , G <sub>4</sub> }	{G <sub>3</sub> }	{G <sub>6</sub> }	{G <sub>7</sub> }	{G <sub>2</sub> }	{G <sub>1</sub> }	Alternative scenario
B <sub>0.05</sub>	D <sub>0.00</sub>	B <sub>0.00</sub>	B <sub>0.01</sub>	B <sub>0.00</sub>	B <sub>0.02</sub>	A: 'Worst case scenario'
D <sub>0.05</sub>	C <sub>0.05</sub>	C <sub>0.05</sub>	D <sub>0.06</sub>	D <sub>0.05</sub>	D <sub>0.07</sub>	B: 'Shift to the hinterland—Green perspective'
C <sub>0.28</sub>	B <sub>0.50</sub>	D <sub>0.20</sub>	C <sub>0.45</sub>	C <sub>0.50</sub>	C <sub>0.48</sub>	C: 'Shift to the sea—Blue perspective'
A <sub>1.35</sub>	A <sub>0.50</sub>	A <sub>0.95</sub>	A <sub>0.78</sub>	A <sub>0.80</sub>	A <sub>0.80</sub>	D: 'Shift to sea and hinterland—Green and blue perspective'

Source: Stratigea and Katsoni (2015)

hinterland') by all stakeholders with the exception of stakeholder G<sub>3</sub> (tourism representatives). This is in alignment with the outcome of the multicriteria analysis prioritization. G<sub>3</sub> rates first Scenario D ('Shift to both sea and hinterland'), presenting more business opportunities for the tourist sector. The larger coalition for Scenario B (all stakeholders but tourism representatives) is explained by the range of opportunities presented by this scenario for the island as a whole, by sustainably exploiting local resources and spreading benefits in all economic sectors, achieving thus a better integration of these local economic sectors.

Moreover, a certain agreement was reached as to the second in sequence scenario, being Scenario D ('Shift to both sea and hinterland'), with the exception of G<sub>3</sub> (tourism representatives) who have rated it first and G<sub>6</sub> (Environmental association) who rates second Scenario C ('Shift to the Sea'). Stakeholder G<sub>6</sub> seems to prefer scenarios B and C, exhibiting the least nuisance as to the local assets. Finally, worst case scenario (Scenario A) is rated at the lowest level by all stakeholders' groups, which implies that a certain consensus is reached among the majority of these groups regarding the need for 'breaking' current mass tourism unsustainable trajectory.

As Scenarios B ('Shift to the hinterland') and D (Shift to sea and hinterland') are almost equally performing as to the goal and objectives set in this planning exercise (see Fig. 4 above), it seems that decision makers and planners have certain

*flexibility* in meeting local stakeholders' preferences by choosing between these two scenarios, properly adjusting the one selected in order to fulfill all stakeholders' expectations.

## 6 Conclusions

The focus of the present paper is on the *sustainable tourist development of peripheral small island regions*, setting as an example an island from the Greek territory disposing such attributes, the island of Lefkada. Development perspectives of such regions are fraught with difficulties. These are mainly due to their isolation from the hinterland, as witnessed in most European island regions (Spilanis, 2012), but also their limited capacity to cope with climate change impacts; volatile tourist demand due to decisions made by global tourist distribution channels; globalization effects and commands as to greater levels of efficiency, effectiveness, productivity and profitability of local businesses; etc. On the other hand, such regions are privileged in terms of natural and cultural heritage, a comparative advantage which can, when sustainably exploited, support their long term competitive position in the global tourist scene, by capitalizing on these assets to differentiate on the basis of quality, multiple and unique experiences offered to visitors, peaceful scenic tourist routes and environmentally-committed products etc.

Sticking to competitiveness without sustainability of tourist destinations is illusory, while as stated by Ritchie and Crouch (2000), a truly competitive destination is the one that perceives competitiveness from an economical, ecological, social, cultural and political point of view. This brings to the fore a quadruple bottom line approach integrating, in an equally balanced way, economic, environmental, social and political aspects (Ruhanen, 2007). Taking the above into account, it is clearly understood that strengthening competitiveness of peripheral small island regions highlights the need for destination planners and local decision makers to adopt more *strategic, proactive, normative approaches* which, based on *strategic consensual visioning* involving all interested parties, will be capable of creating more well structured views and thus more knowledgeable decisions for: keeping track with increasing market competitiveness; taking into consideration challenges and threats arising from the external environment; linking more effectively tourist destinations policy options with global developments and challenges; reaching consensus at the local level, where decisions made are consistent with values and expectations of local communities; and ensuring the achievement of sustainability objectives, for a more long term flourishing of such destinations (Faulkner, 2003; Ritchie & Crouch, 2000; Ruhanen, 2007).

In order the above objectives to be fulfilled, a policy analysis framework is proposed, which sets the ground for guiding strategic policy decisions towards the sustainable tourist development of a peripheral small island region, Lefkada-Greece. Four discrete sustainable future development scenarios of the tourist sector of the study area are presented which, apart from the worst-case scenario, are built



upon a *proactive and integrated approach* of the sector, incorporating contemporary *policy directions* as to the ‘green’ and ‘blue growth’ alternative tourism perspectives. These are also drawn upon contemporary trends of the global tourist market, expressed by the shift towards more mature tourist flows, seeking new experiences of places, cultures, gastronomy, etc. The evaluation of these scenarios is based on a *participatory multicriteria evaluation model*, capable of dealing with both quantitative and qualitative data and of detecting potential *alliances or conflicts* among stakeholders’ groups involved. The engagement of public and stakeholders in such a planning exercise can: establish a ‘learning platform’, facilitating information exchange and mutual understanding among participants, thus considered as the driving force towards a shared ‘ground’ of future developments of the specific region; support the gathering of valuable information on stakeholders’ judgments on the proposed future development scenarios for further enriching the planning process and outcome; and ensure credibility and transparency in the decision-making process. Moreover, for a successful planning outcome, it is important for planners to be able to identify the level of ‘acceptability’ of goals/objectives and resulting plans, which can drive their efforts for better orienting policy actions and reaching consensus on behalf of a more effective implementation of plans (Stratigea & Papadopoulou, 2013). The latter is of crucial importance, as it can guide decision-making and support policy makers in coping with conflicting interests in the region at hand.

As to the area of concern, the analysis carried out shows that there is a strong need to ‘break’ existing tourist development pattern and build a more *spatially balanced and environmentally responsible profile* of the tourist sector in order local resources and identity for a lasting tourist development that copes successfully with sustainability objectives to be preserved. Participatory evaluation of the proposed future options proved a good exercise for establishing interaction among different interests, increasing mutual understanding among them and increasing awareness on the necessity for an integrated and of long term perspective towards the sustainable use of local assets and tourist development of the island. Based on that, the type and pace of tourist development, the necessary interventions towards this end, the social and cultural implications of preferred options, etc. can be explored.

The high level of *consensus* reached as to a certain scenario (Scenario B—‘Shift to the hinterland’) reflects the need for realizing a tourist development perspective that builds upon all sectors (‘green’ tourist perspective), keeps in track and reinforces local identity, traditions, etc. and spreads the benefits reaped to the whole society. Moreover, the participatory evaluation exercise and the interaction with local stakeholders revealed to planners and local decision makers the ‘way to go’, thus setting the ground for more sound policy decisions that reflect local preferences and will be able to fulfill present but also future development perspectives of this small peripheral Greek island.

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# Tourism Strategic and Marketing Planning and Cultural Cooperation Channels Between Greece and Turkey

Vicky Katsoni, Irfan Arikan, and Alev Dündar

**Abstract** Governments and other strategic tourism principals play a key role in supporting and developing the tourism industry, as they have been confronted with a series of challenging issues including those related to infrastructure, partnerships, developing legislative and policy frameworks, destination marketing, and ensuring that tourism development supports broad economic, environmental, and socio-cultural imperatives. Turkey with its neighbouring country Greece, need to have integrated tourism plans and programmes in order to bring about synergy, strengthen networks among tour operators in both areas and to develop tourism planning. The paper argues that developing cooperation between Greece and Turkey, may lead to the use of the sources at maximum levels creating a wider range of tourism products and thus their members will be provided with significant capacity and responsibility to formulate a vision.

**Keywords** Turkey • Greece • Tourism • Cultural cooperation • Tourism channels

## 1 Introduction

Tourism is mainly a service (intangible, heterogeneous, perishable), with tangible physical elements (e.g., hotel buildings, transportation vehicles, etc.). A large number of scholars (Archer & Owen, 1971; Banskota, 2007; Lee & Chang, 2008; Rasul & Manandhar, 2009; Sinclair, 1998) argue that tourism can stimulate development in terms of income, employment, foreign exchange earnings and taxation, as well as have multiplier and spillover effects, as it consumes a wide variety of local goods and services and thereby distributes income widely. The different

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branches of the tourism industry (transport, accommodation, catering, food and beverage, excursions and recreational activities) can generate employment and income for diverse population groups (Rasul & Manandhar, 2009). It is a horizontal activity where interests are very diversified and sometimes evidently conflict (e.g., between Members States which can import or export tourism; or between large organisations and small/individual companies) and this activity very much depends on public authorities or on public and rare resources.

This paper argues that in order to improve the crucial contribution of tourism to both Greece and Turkey, it is clear that a general framework must be set up between tourism policy and the structural funds. More coherent action to develop tourism may benefit the regional and local authorities as well as the tourism industry. Partnerships, cultural cooperation and concentration can, among others, contribute to the development of specific regions and to the mutual benefit of both countries.

## 2 The Conceptual Framework of Tourism in Turkey and Greece

It is clear that tourism in Europe is concentrated around the Mediterranean, as the density of tourism capacity is generally greater in the southern coastal regions of the European Union. The Alpine regions also occupy a strong position (Eurostat, 2011: 224). In addition to the five countries represented in the top 20 EU regions (Italy, Spain, France, Austria and Germany), 10 more countries have NUTS 2 regions reporting more than 8 million overnight stays: Turkey, the United Kingdom, Croatia, Portugal, Greece, the Netherlands, Cyprus, the Czech Republic, Sweden and Switzerland (Eurostat, 2011: 184). However, climatic conditions are not the only factors that explain this density; infrastructures are also more developed in the urbanised regions or in the regions that have a significant cultural heritage. The following trends in tourism will become more important and are all of relevance at the Greek and Turkish level (Eurostat, 2011: 187–189):

- Travel intensity is growing, along with the number of European holiday-makers.
- Tourists are increasingly taking more than one holiday a year.
- The number of older as well as young tourists is increasing substantially.
- Tourism will focus more on special interests.
- Flexibility and individualisation will be key words.
- More environmentally or culturally friendly activities are sought.
- The need for transport networks is increasing strongly along with the development of tourism without borders (i.e., air traffic growth, a very high level of car and bus traffic); therefore, the development of, among other aspects of transport, Trans-European Networks (TENs), intermodal transport systems, road traffic information, new cleaner cars and fuels are determining factors for a new policy for tourism.

Tourism in Turkey is growing, improving and diversifying through globalization. As it is mentioned in the Tourism Strategy of Turkey-2023, for the strategic regional planning for tourism development a tourism development scenario should be worked out in the first place and then the target groups should be defined accordingly. Tourism shall be used as a sound planning and implementation tool for efforts dedicated to elimination of regional inequalities, alleviation of poverty and development of employment opportunities (Tourism Strategy of Turkey-2023, 2007).

The changing nature of regional areas poses fundamental challenges for residents, business operators, community leaders and governments concerned with maintaining economically strong, environmentally sustainable and socially vibrant regional communities (Katsoni, 2011). Regional economies need to diversify through new and innovative approaches to enterprise development (Douglas, Douglas, & Derrett, 2001: 87). To ensure development of tourism activities at regional level is an objective that is attainable only when top priority regions and areas are determined according to the sector specific plans worked out by the Ministry of Culture and Tourism and also the macro policies evolved and institutionalised in national development schemes prepared by the State Planning Organization. Like in many countries, also in Turkey both the tourism industry and governments are interested in finding ways to optimise tourism's economic and social contribution in regional areas (Ahipaşaoğlu & Celtek, 2006: 106).

The novel planning approach for tourism centers and development areas mainly adopts a flexible and strategic planning concept, which is built upon actions rather than strict land use decisions and targets. In these areas, the project sites are further divided into subzones, so that planning takes place and the investors are expected to set up individual projects of their own. According to Tourism Strategy of Turkey-2023 planning of tourism industry, especially tourism oriented physical planning should be supported by all available organizational models, alternative means of funding and a sound legal framework. In this context, an effective policy should (Tourism Strategy of Turkey-2023):

1. reroute all tourism investments toward reducing the imbalances of welfare and development imbalances throughout the country and treat them with an approach that safeguards, conserves and improves the natural, historical, cultural and social environment,
2. broaden the base of participation in social, cultural and artistic events and propagate the notion of development,
3. reveal and expose, primarily with scientific studies, the cultural and artistic values and heritage, and create a community awareness on these assets,
4. relating the tourism industry's development with market facts in order to help a healthy structuring and increased productivity,
5. respond to both the rehabilitation needs of the investment environment and the ever changing global trends and contemporary demands,
6. conserve and use natural resources in the most economically and ecologically sustainable way,

7. realize such organization and funding models that do not pose any financial burden on public and widen comprehensively organized and integrated projects at regional and local levels,
8. make use of tourism sources in a sense of conservation and balanced development, avoiding to exceed their carrying capacities,
9. develop an “area management” model that accounts for an understanding of tourism, which focuses on historical, cultural and artistic assets, namely assets-based tourism or destination based tourism development instead of a hotel or other mass accommodation facility based one, that responds fully the demands and expectations of the local public,
10. avoid any adverse affects on nature, culture and social structure, make sound contributions to economic growth with foreign exchange receipt and employment dimensions, organize the demand, create the grounds needed for further development of tourism industry and produce integrated, self-implementing projects,
11. not place the burden of social and technical infrastructure projects on public, but provide the sufficient grounds on which the funding needs of the same can be supplied jointly by users and beneficiaries, on a shared basis,
12. envisage development of tourism settlements that possess environment and organizational structuring at an acceptable level of quality,
13. present a fully total quality criteria compliant service in the fields of environment, transportation, accommodation, culture, history and arts, prevent irregular urban development and sprawl and restore readily deformed city and urban spots, and
14. finally solve infrastructure and environmental problem arising in regions where tourism movements get denser in close cooperation with local governments and contributions of infrastructure users.

To address these issues, governments in Turkey are focusing increased attention on regional development. Many regional communities have skilled labour, space and other physical resources needed for enterprise development. Decentralized, service-based industries such as tourism offer the potential to diversify regional economic activity in the face of the changing global economy (Douglas et al., 2001: 88).

In the planning of tourism development areas, by local governments it shall be essential to consult with companies engaged with developing and directing investments in the tourism industry, beholding valid and legitimate licenses issued by the Ministry of Culture and Tourism. A flexible and strategic planning approach shall be developed and adopted, that equally addresses organizational modeling, funding alternatives and legal grounds. Physical plans shall be used for generation of strategic decisions relating not only to land use but also to all other aspects including physical environment, employment, social services and organization.

In order that Turkish strategic regional planning for tourism development to reach its objectives, it is important that public institutions and organizations, the business world and non-governmental organizations as well as the whole public

adopt the strategy and act harmoniously according to the common benefits. In order that this harmony can be realized at the highest level, it is being aimed to realize an efficient, transparent and accountable process at the level of political and administrative management, decision taking, programming, resource allocation, application, coordination and supervision. Within this framework the implementation of the strategy could be managed through a close co-operation of commercial and public organisations positioned in the tourism sector (Arikan, Kaya, & Kosan, 2011: 13–14).

### 3 Cultural Cooperation

Culture and tourism are two strongly interrelated notions, since modern tourist—better educated and cultured, with high demands—attempts to gratify new needs, among which is the acquaintance with new cultures, customs and traditions on places of interest. In parallel, the touristic exploitation of culture through its enhancement and promotion, contributes significantly to the development of each cultural destination. Therefore, in the recent years cultural tourism is one of the largest markets with rapid growth.

Timothy and Nyaupane (2009) mention that cultural-heritage tourism relies on living and built elements of culture and encompasses the use of the tangible and intangible past as a tourism resource. More precisely, cultural tourism is constituted of existing culture and folkways which are inherited from the past, other immaterial heritage elements, such as music, dance, language, religion, foodways and cuisine, artistic traditions, festivals as well as parts of the built cultural environment such as archeological ruins, museums, churches, mosques, castles, historic monuments and buildings. Subsequently, Timothy and Nyaupane highlight that people mostly visit cultural and heritage destinations in order to enhance their knowledge, satisfy their curiosity and feelings of nostalgia.

**“Religious Tourism”** is considered one of the most important forms of heritage tourism in the developing world today. In general, pilgrimage has many forms but the main core of this tendency is the desire of believers to pray, to become closer to God, become healed, and receive forgiveness for sins. In many religions such as Islam, Christianity, Buddhism and Hinduism this form of travel is required or encouraged. The peaceful coexist of Christians and Muslims is another reason that makes Greece an ideal tourism destination for Turkish travelers and Turkey for Greek travelers, since they feel more welcome and familiar. Furthermore, the fact that an important segment of the Muslim population in Greece knows the Turkish language makes Greece as a destination more attractive. The organization process of a potential trip as well as the stay are conducted more easily, overcoming to some extent the language barriers which could be derived in other destinations. Turkish travelers appreciate the quality of their vacations while staying in Greece, since the sense of pure hospitality and tradition’s authenticity create a more intimate atmosphere.



**“Diaspora Tourism”** is referred as another significant form of heritage tourism. Travelers are people from various backgrounds who are interested to search and learn about their roots, to visit their homelands, in other words to learn something more about themselves. Historical facts play an important role between the two nations. In particular, based on treaty of Lausanne in 1923, a population exchange was conducted between Greece and Turkey. Hence, nowadays thousands of Turkish travelers visit different places of origin of their ancestors in the mountainous areas of Thrace, and Greek travelers visit Izmir and Istanbul mainly. The significance of the diaspora phenomenon which is an integral part of both cultures and concluding that Greece and Turkey can be benefited within the promotion of this part of their cultural heritage.

Timothy and Nyapane continue, by referring **“Living Culture”** as an additional prominent form of heritage tourism. Cultural features such as agricultural landscapes, arts and handicrafts, villages, languages musical tradition, local festivals, spiritual and religious practices, and other of the cultural landscape constitute what we perceive as living culture. Within this tourism context, Greece constitutes one of the classic tourism destinations of the Mediterranean, by combining unique natural diversity and exceptional cultural heritage. The last years it is observed the need to develop alternative forms of tourism, especially the cultural tourism, where Greece has an indisputable advantage.

Furthermore, **“Culinary Heritage”**, cuisine and foodways play a vital role as a part of the living culture of each destination, attracting masses of cultural travelers. Cultural features such as gastronomy, entertainment and generally the Greek way of life could be considered as pull factors for the Turkish travelers. The Turkish travelers show a great interest to try the local gastronomy as well as to experience the way of entertainment (e.g., nightlife) which is different to some extent with their own.

The last crucial form of heritage tourism is the **“Built Heritage”**, encompassing archeological cities and ancient monuments. Both forms contribute significantly as important cultural resources. The recent decades many magnificent, ancient cities have become world-class destinations in Asia, Latin America and Europe, being nowadays remarkable international gateways and centers of tourism commerce. On the other hand, archeological sites and ancient monuments are important components of culture in destinations where material culture was one of the major parts of the tangible past. There are great potentials of tourism development in Greece, focusing on the Turkish traveler’s market, because of the short distance between both countries. It is observed an increasing flow of Turkish travelers which visit Thessaloniki, the hometown of Turkey’s founder Kemal Atatürk.

Turkish outbound tourism appears to have a great dynamic, following to some extent the financial growth of the economy the last decade. This trend has a direct impact on traveler’s profile in terms of the preferences, the decision making process as well as the vacation expenses. Greece, Bulgaria, Netherlands, Germany, Italy and Spain are considered some of the most popular tourism destinations according to recent statistical data. According to the research of the Greek embassy (2014: 11) in Ankara, Turkish travelers’ profile has changed because of a positive alteration of

the living standard in a wide part of the population. Important indicators such as the constant strengthen of the middle class, the educational level improvement, the increasing usage of the internet, the urbanization phenomenon as well as the overall economic development demonstrate the growth of the Turkish society in various aspects. This multidimensional evolvement has influenced the tourism preferences as well, by changing the typical Turkish traveler who was mainly interested in domestic vacations. An increasing trend has appeared of travelers who are willing to explore new destinations abroad.

The most popular destinations for Turkish travelers in 2012, mainly in the summer period, were: Greece, Syria, Bulgaria, Netherlands, Germany, Italy, Spain and Ukraine. Among these countries, Greece is considered as a prominent tourism destination, due its location (easy accessibility) and more attractive prices the last years. According to the statistical measures in 2012 the majority of the tourism packages from Turkey (85.450) were booked for Greece (Greek Embassy, 2014: 12).

Generally, the GNT0 research highlighted the prominent role of Greece as tourism destination for the Turkish outbound tourism, by analyzing different significant factors such as demographic data, preferences and geographical dispersion of travelers (GNT0, 2014). One fact could be considered as quite important, history and culture are the primary reasons for Turkish travelers in order to choose Greece and for Greek travelers to choose Turkey for their vacations. Highlighting the remaining stereotypes and prejudices which are based on the common recent history and manifested occasionally, mainly from the press in both sides. As a result, the induced suspicion delays the target of a broader tourism development, although during the last decade the relation between the two countries in on the right track. Barriers which are related to visa process for the Turkish travelers still remain.

A challenge is to succeed cooperation between the local stakeholders and tourism entrepreneurs in order to create quality tourism packages according to the demand of the Turkish and Greek travelers. Within this cooperation, the creation of a complete tourism package seems necessary, including the right mix of options such as restaurants, shops, bars as well as leisure activities and definitely a group of cultural attractions. Families and schools (e.g., educational excursions) would be a good starting point.

Conforming to the above mentioned facts, the following recommendations have been drawn for further actions (Tsengelidis, 2015: 78–82): It is suggested an implementation of a constant process for gathering and analyzing information about the current trends and best practices in cultural tourism as well as the special needs and preferences of the Turkish and Greek travelers. In this case, a deeper involvement of regional and local education institutions is needed. Projects on a periodic basis would contribute significantly, by communicating to the local stakeholders which are the current trends and innovative tactics in order to set reliably the strategic priorities of both countries. In parallel, a regular dialogue among the local stakeholders that is based in facts concerning the needs and preferences of the Turkish and Greek travelers has a vital role. The collection of qualitative and

quantitative data (e.g., visitation rates, special needs, complaints) could be beneficial on this direction.

Various campaigns should be developed both domestically and in foreign markets, by emphasizing on the unique characteristics and attractive elements of both countries. Within this process, the extensive use of social media, as one of the main marketing tools, is highly recommended, in order to be achieved a strong promotion of the brand awareness as well as deeper penetration in the Turkish and Greek inbound and outbound market.

## 4 Conclusion

Crouch and Ritchie (1999: 139) state that the shift taking place in the global tourism paradigm “demands greater *cooperation* and *collaboration* at the local and regional levels to ensure a quality tourism product that can *compete* effectively at the global level” and this implies that a sense of cohesiveness in the understanding of a country’s mission and goals in regard to tourism is needed at all levels of government.

The need for regional tourism cooperation and integration between and among neighbouring countries in order to make better use of their complementarities and competitiveness has arisen for several reasons (Madawela, 2003; Rasul & Manandhar, 2009; Ohmae, 1995). Firstly, economic globalization and liberalization have been driving the world economy, breaking national barriers, integrating national economies into the global economy and stimulating regional cooperation. Secondly, tourism is scale sensitive and as the scale increases, the cost decreases. Cooperation among geographically proximate countries can help to exploit economies of scale in the supply of tourist goods and services, thereby enhancing competitiveness by reducing costs and enhancing efficiency (Porter, 1998; Sinclair, 1998). Collaboration can also bring synergistic gains to neighbouring countries from sharing resources, risks and commonalities and complementarities by capitalizing on ‘collaborative advantages’ rather than on individual ‘competitive advantages’ (Ohmae, 1995). Cooperation can also help in cross-border marketing and the creation of a tourism cluster spanning different countries (Hjalager, 2007; Jackson, 2006).

Thirdly, intra-regional tourism has been pushed by the growing regional tourism market (Rasul & Manandhar, 2009). In developing countries, the tourism market has been growing due to economic growth and the growing middle class. Tourism is a ‘luxury good’ and demand for it increases at a higher rate than income increases due to the positive income elasticity of demand (Shaw & Williams, 1998). In order to realize the potential of the regional market for tourism, it is important for regional countries to co-operate and collaborate with a view to promoting the region as a whole and to facilitate the intra-regional movement of regional and international tourists (Rasul & Manandhar, 2009). Recent trends have shown that

neighboring countries are establishing cost-effective regional joint marketing and promotional programmes and pooling financial and human resources (Thein, 2005).

The coastal regions around the Mediterranean basin have a wide variety of demographic and economic characteristics. Indeed, the structure of the population, the labour market, jobs, tourism facilities or the possibility of leaving or arriving by boat vary considerably from one coastal region to another. Accordingly, the demographic pressure exerted by the inhabitants of these regions will not have the same intensity from region to region. These regions are attractive places to live for their inhabitants and tourists, prime business areas for sectors with links to the sea and obligatory points of transit for goods and passengers transported by sea. It is therefore not surprising that these regions constitute a major focal point and are very much involved in the introduction and follow-up of an integrated tourism policy at local, national European and international levels. Turkey with its neighbouring country Greece, need to have integrated tourism plans and programmes in order to bring about synergy, strengthen networks among tour operators in both areas and to develop tourism planning. The cooperation and coordination among the stakeholders of both countries is imperative towards the future. It is recommended the conduction of tourism workshops and congresses, aiming to define and propose methods for efficient cooperation and communication at local level.

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# Predicting Tourism Demand in the Western Greece Region Using Independent Component Analysis

Athanasios Koutras, Alkiviadis Panagopoulos, and Ioannis A. Nikas

**Abstract** In this paper we propose a new technique to forecast tourism demand based on Independent Component Analysis. The proposed method uses Dynamic Embedding (DE) to transform the time series in a higher dimensional space, where Independent Component Analysis is performed to estimate the independent components (sources). Prediction is then applied using well known forecasting techniques based on ARIMA models on each independent component, and the estimated ICs are transformed back into the data space to estimate the prediction. Experiments conducted using real data of tourism demand showing the occupancy of all tourist accommodations (except from camping sites) of the Western Region of Greece, have proven the efficacy of the proposed forecasting method compared to well-known methods based on ARIMA models, for various prediction steps.

**Keywords** ARIMA • Independent Component Analysis • Tourism demand forecasting • Forecasting model • Western Greece tourism • Time-series

## 1 Introduction

It is well known, that tourism industry produces a perishable product which strongly depends on micro-macroeconomic factors, natural disasters, cultural events, social behaviors, marketing policies etc. At the same time tourism expenditure has become a valuable source of economic activity and employment.

In this work a study of the tourist occupancy in the area of Western Greece is presented. The Western Greece region consists of three dissimilar prefectures (Achaia, Ilia, Aitolokarnania) regarding the type of the visiting tourists, the available resources and infrastructures and the level of development and

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employment (Panagopoulos & Panagopoulos, 2005). However, despite the heterogeneous geographic morphology and economic activity, the overall region retains the same characteristics of a tourist destination, that is, the suggestibility in various exogenous factors as well as the considerable contribution to the local and country economy.

The most notable factors describing the tourist industry in the area are the tourism development and the finance crisis. The last decades, the massive tourism development of the region had been rapidly increased and a significant number of residents have turned into tourist occupations (Panagopoulos & Panagopoulos, 2005). In addition, during the last few years, Greece, as well as the area of Western Greece, experiences a strong finance crisis and one of the remaining productive sectors (both private and public) that present a significant activity is the tourism industry.

All the aforementioned facts are crucial for all specialists and consultants on economic affairs who make and adopt policies concerning tourism in order to have a clear view in the near and distant future. It is of a great importance to be able to forecast accurately future tourism demand to maximize the benefits of selling the tourist product and minimize the loss of a predictable disaster or misadventure. However the special nature of the characteristics of the tourist product cannot allow forecasters to easily make, reliable and efficient suggestions in the future timeframe.

In this direction, Panagopoulos An. & Al. proposed a forecasting model for predicting the tourist occupancy in the West Greece area using the Box-Jenkins Method (1976) using monthly data from January 1990 to December 1999 forecasting for 2 years (Panagopoulos & Panagopoulos, 2005).

Thus, the study of the West Greece region still remains a great challenge, due to all the inherent dissimilarities, and any suggestions in the direction of modeling the overall tourist product circulation remains a well-timed issue for both researchers and local authorities.

Considering that there exists no clear evidence that a unique forecasting model can always deliver trustworthy forecasts (Song & Li, 2008), different methods and techniques have been proposed covering a wide range of different countries and locations, as well as different time intervals. The most widely used models (especially using monthly data) are univariate or time-series models (Gunter & Önder, 2015). The most widely used technique in this framework is the (Seasonal) Autoregressive (Integrated) Moving Average models (Box & Jenkins, 1976). Recently, some new, well performed, time-series models have been proposed such as the Exponential Smoothing models (Hyndman, Koehler, Ord, & Snyder, 2008; Hyndman, Koehler, Snyder, & Grose, 2002), and a low cost inferential model (Psillakis, Panagopoulos, & Kanellopoulos, 2009); multivariate or Econometric models are also employed, such as Autoregressive Distributed Lag Models (Dritsakis & Athanasiadis, 2000; Ismail, Iverson, & Cai, 2000), Error Correction Models (Kulendran & Witt, 2003; Roselló, Font, & Roselló, 2004), Vector Autoregressive models (Shan & Wilson, 2001; Witt, Song, & Wanhill, 2004) and Time-Varying Parameter models (Li, Song, & Witt, 2006; Song & Witt, 2006);

some artificial intelligence methods were, also, used (Chena & Wang, 2007; Claveria & Torra, 2014; Hernández-López & Cáceres-Hernández, 2007; Kon & Turner, 2005; Palmer, Montañó, & Sesé, 2006). An exhaustive review on forecasting time series can be found in (Song & Li, 2008).

The problem of predicting future values on the basis of some collected historical data arises in many scientific, economic and engineering applications (Wan, 1993; Weigend & Gershenfeld, 1994; Weigend, Huberman, & Rumelhart, 1990), i.e. the prediction of future sample values of time series by extracting knowledge from its past values. The most powerful approach to the problem of prediction is to find a law underlying the given dynamic process or phenomenon. If such law can be discovered and analytically described, i.e. by a set of ordinary differential equations, then by solving them we can predict the future values if the initial conditions are completely specified. Unfortunately, the information about a dynamic process under investigation is often only partial and incomplete, so the prediction cannot be based on a known analytical model. In this case we must try a less powerful approach and attempt to discover some strong empirical regularity in the observation of the time series. The unknown dynamic process is described by the nonlinear multivariable function:

$$y(k) = F[y(k-1), y(k-2), \dots, y(k-n)], \quad (1)$$

where  $y(k)$ ,  $k = N, N-1, \dots, n$  with  $n \ll N$  are given samples of the time series and  $F[\cdot]$  is an unknown nonlinear function. Such a function can be viewed as a multidimensional surface. This means that the present or a future value is assumed to be a nonlinear function of the  $n$  previous ones. In a more compact form the above equation can be rewritten as

$$y(k) = F[x(k)]. \quad (2)$$

In this paper we have used a new prediction technique based on Independent Component Analysis (ICA) that transforms the data to a set of statistical Independent components (ICs). Then prediction is performed on each IC separately using any known forecasting method depending on the nature of the data. In this paper, the prediction approach that was used is based on ARIMA models (Box, Jenkins, & Reinsel, 1994). Finally, the ICs are transformed back to the data space and mixed again to form the predicted time series. In order ICA to be applied to a single time series, the time series must be first transformed to a higher dimensionality space using Dynamical System Analysis and Dynamical Embedding (DE).

The structure of the paper is as follows: In the next section we present the methodology of the proposed prediction method. In Sect. 3 our experiments are presented while in the last section, some conclusions and remarks are drawn.



## 2 Methodology

### 2.1 Independent Component Analysis

The task of ICA is to estimate a set of independent components that transform the input feature vector of the observations  $\mathbf{x}$  into vector of independent components  $\mathbf{y}$  using all available higher order statistical information of the observations. The linear projection of the observations is given by:

$$\mathbf{y}(t) = \mathbf{W}_{ICA}\mathbf{x}(t) \quad (3)$$

where,  $\mathbf{W}_{ICA}$  is the  $M \times M$  ICA separating matrix with the transformation axes. To estimate this matrix in an unsupervised manner, we apply the Maximum Likelihood Estimation criterion (MLE). The log-likelihood of the observations  $\mathbf{x}$  is given by:

$$L = \log(p_{\mathbf{x}}(\mathbf{x}; \mathbf{W}_{ICA})) = \log(|\mathbf{W}_{ICA}|) + \log(p_{\mathbf{y}}(\mathbf{y})). \quad (4)$$

The weights of the ICA network are estimated recursively using the stochastic gradient of  $L$  with respect to the matrix  $\mathbf{W}_{ICA}$ :

$$\frac{\partial L}{\partial \mathbf{W}_{ICA}} = [\mathbf{W}_{ICA}^{-1}]^T - \Phi(\mathbf{y})\mathbf{x}^T, \quad (5)$$

where

$$\Phi(\mathbf{y}) = - \left[ \frac{p'_1(y_1; \mathbf{W}_{ICA})}{p_1(y_1; \mathbf{W}_{ICA})} \cdots \frac{p'_N(y_N; \mathbf{W}_{ICA})}{p_N(y_N; \mathbf{W}_{ICA})} \right]^T \quad (6)$$

and  $p_i(y_i; \mathbf{W}_{ICA})$  is the probability density function of the  $i^{th}$  source signal. The marginal pdf of the source regions for the examined time series was found experimentally to follow the hyperbolic cosine distribution with  $p_i(y_i; \mathbf{W}_{ICA}) \propto 1/\cosh(y_i)$ , so  $\Phi(y_i) = \tanh(y_i)$ . From (5) and using the natural gradient approach, we derived the following weight adaptation rule for the  $\mathbf{W}_{ICA}$  matrix:

$$\Delta \mathbf{W}_{ICA} = -n \frac{\partial L}{\partial \mathbf{W}_{ICA}} \mathbf{W}_{ICA}^T \mathbf{W}_{ICA} = n [\mathbf{I} - \Phi(\mathbf{y})\mathbf{y}^T] \mathbf{W}_{ICA} \quad (7)$$

### 2.2 ICA Based Prediction

Independent Components estimated by (3) can be compressed by fewer bits than the observed signals  $\mathbf{x}(t)$ . They are thus more structured and regular. This gives motivation to try to predict the signals  $x_i(t)$  by first going to the ICA subspace,

performing the prediction there and then transforming back to the original time series, as suggested by (Pawelzik, Muller, & Kohlmorgen, 1996). The prediction can be done separately and possibly with a different method for each component, depending on its time structure. Furthermore, for each independent component  $s_i(t)$  a suitable nonlinear filtering can be applied to reduce the effects of noise. In particular, the ICs that contain very low frequencies (such as trend, slow cyclical variations) are smoothed, whereas the components that contain high frequencies or sudden shocks are high-pass filtered. As a next step, the non-linearly transformed components are predicted separately, using any kind of linear or non-linear prediction technique (Koutras et al., 2001). In this work we have used the method of ARIMA modelling and the prediction is performed for a number of different steps into the future.

### 2.3 Dynamical System Analysis

In order to apply the ICA method on the observed tourism demand time series, we must first transform it into a higher dimensionality space. To this end we have used the Dynamical System Analysis method and in particular the Dynamical Embedding (DE) technique. Given a sampled time series, through DE we attempt to uncover as much information as possible about the underlying generators based only on the measured data (Broomhead & King, 1986). This is based on the assumption that the measured signal is due to the non-linear interaction of just a few degrees of freedom, with additive noise and suggests the existence of an unobservable deterministic generator of the observed data. If the number of degrees of freedom of the underlying system is given by  $D$ , then  $D$  can be used as a coarse measure of system complexity. Using the Taken's theorem (1981) we can reconstruct the unknown dynamical system that generated the measured time series by reconstructing a new state space based on successive observations of the time series. A DE matrix is constructed from a set of delayed vectors taken from the observed data  $\mathbf{x}(t)$ , where the state of the unobservable system at time  $t$  is given by  $\mathbf{X}(t)$ :

$$\mathbf{X}(t) = \{x(t - \tau), x(t - 2\tau), \dots, x(t - (m - 1)\tau)\}, \quad (8)$$

where  $\tau$  is the time lag and  $m$  is the embedded dimension. The above delay vector describes observations of the underlying system states, assuming that the data  $\mathbf{x}(t)$  are generated by a finite dimensional non-linear system of the form:

$$\mathbf{x}(t) = f\{\mathbf{X}(t - 1), \mathbf{X}(t - 2), \dots, \mathbf{X}(t - D)\} + e_t \quad (9)$$

where  $e_t$  is i.i.d. with zero mean and unit variance. Takens (1981) showed that the Euclidean embedding dimension  $m$  must be as large as  $D$ , but in practice must be such that,

$$m > 2D + 1 \quad (10)$$

When applied to real world data the delay vector's size  $m$  actually used needs to be a lot larger than the Euclidean embedding dimension  $m$  because of the dependences of the time series and the noise of the system. The parameter  $m$  needs to be chosen to be big enough to capture the information content necessary and if the time series is heavily correlated, then more time series samples are needed to make up the required information content of the delay vector. Once the optimal delay vector has been estimated, an embedding matrix is constructed out of a number of consecutive delay vectors. The number of delay vectors  $N$ , is determined by the length of the signal to be analysed but in practice must be as large as  $m$ . The form of the embedding matrix is:

$$\mathbf{X} = \begin{bmatrix} x(t) & x(t + \tau) & \dots & x(t + N\tau) \\ x(t + \tau) & x(t + 2\tau) & \dots & x(t + (N + 1)\tau) \\ \vdots & \vdots & \vdots & \vdots \\ x(t + (m - 1)\tau) & x(t + m\tau) & \dots & x(t + (m + N - 1)\tau) \end{bmatrix} \quad (11)$$

The practical minimum size of  $m$  can be chosen based on the lowest frequency of interest and the lag  $\tau$  can be set to 1,

$$m \geq \frac{f_s}{f_l}, \tau = 1 \quad (12)$$

where  $f_s$  denotes the sampling frequency and  $f_l$  denotes the lowest frequency of interest in the acquired signal. For the signals described here, we derived values for  $m$  and  $\tau$  in this manner, and over the series of the tourism demand, the choice of  $m = 65$  and  $\tau = 1$  proved optimal. If the choice of the lag term  $\tau$ , the delay vector size  $m$  and number of lag vectors is adequate, then the embedding matrix in equation (11) is rich in information about the temporal structure of the measured data. The overall time series prediction scheme is presented in the following Fig. 1:

Once the prediction is performed in the ICA subspace for every component separately, we return to the data space again to reconstruct the predicted time series. Therefore, the ICs must be projected back to the measurement space such that:

$$\mathbf{Y}^t = a_i \mathbf{y}_i^T, \quad (13)$$

where  $\mathbf{y}_i$  is the  $i^{\text{th}}$  IC ( $i = 1, 2, \dots, p$ ),  $a_i$  the corresponding column of the mixing matrix  $\mathbf{A}$  (the inverse of the separating matrix  $\mathbf{W}_{ICA}$  estimated by Eq. 7) and  $\mathbf{Y}_i$  the resulting "embedding matrix". From  $\mathbf{Y}_i$  it is now possible to extract the projected time series  $y_i(t)$ , by performing an averaging of the rows of  $\mathbf{Y}_i$ , that un-embeds the time series using:

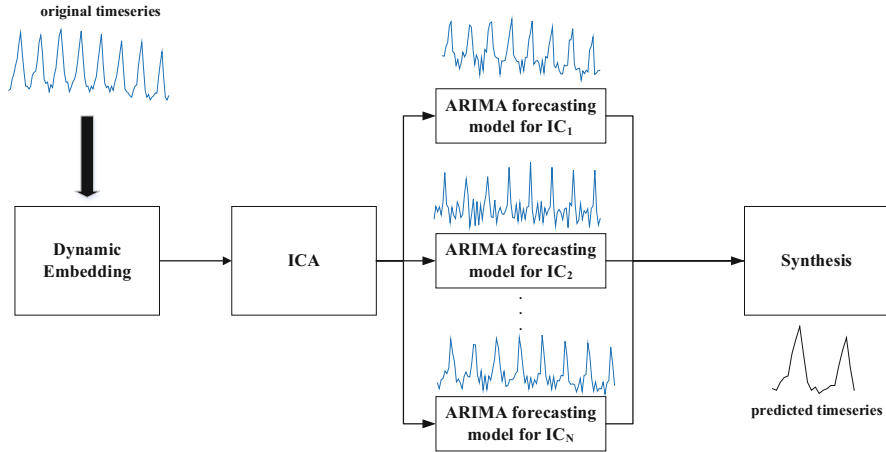


Fig. 1 The proposed ICA-ARIMA forecasting scheme

$$y_i(t) = \frac{1}{m} \sum_{k=1}^m Y_{k,(t+k-1)}^i \tag{14}$$

for  $t = 1, 2, 3, \dots, N$ , where  $Y_{k,(t+k-1)}^i$  refers to the elements of  $Y^i$  indexed by row  $k$  and column  $t + k - 1$ .

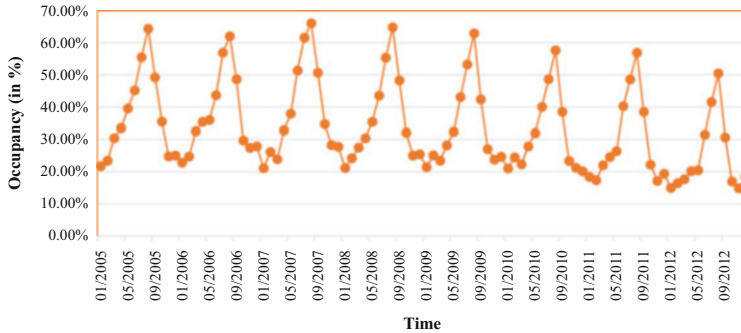
### 3 Experiments

#### 3.1 Experimental Dataset

For evaluating the performance of the proposed ICA-ARIMA forecasting method, the occupancy of all tourist accommodations (except from camping sites) in the Region of Western Greece that includes data from the Prefectures of Aitoloakarnania, Achaia and Hlia from January of 2005 till December 2012. All data employed in this study were obtained from the official records of the Hellenic Statistical Authority. It is underlined that Hellenic Statistical Authority has not released any similar data for the period 2013 until now.

There are a total of 96 data points in the dataset and the monthly occupancy series is plotted in Fig. 2. The plot exhibits a long-term of downward trend as well as a strong seasonality of 12 months with the maxima of the occupancy occurring during the high touristic summer season (maximum in August for every year).

In order to test the performance of the proposed method, the collected data is divided into two sets, training data and testing data. In order to further test the efficacy of the ICA-ARIMA prediction method, we have tested the prediction accuracy with a prediction step ranging from 3 to 48 months (4 years).



**Fig. 2** Monthly occupancies of all tourist accommodations (except from camping sites) from 2005 (1) to 2012 (12)

### 3.2 Performance Criteria

According to Tay and Cao (2001) and Thomason (1999a, 1999b), the prediction performance of our method is evaluated using measures including mean absolute percentage error (MAPE), and root mean square error (RMSE). MAPE and RMSE were used to measure the correctness of the prediction in terms of levels and the deviation between the actual and predicted values. The smaller the values, the closer the predicted values are to the actual values.

### 3.3 Experimental Results

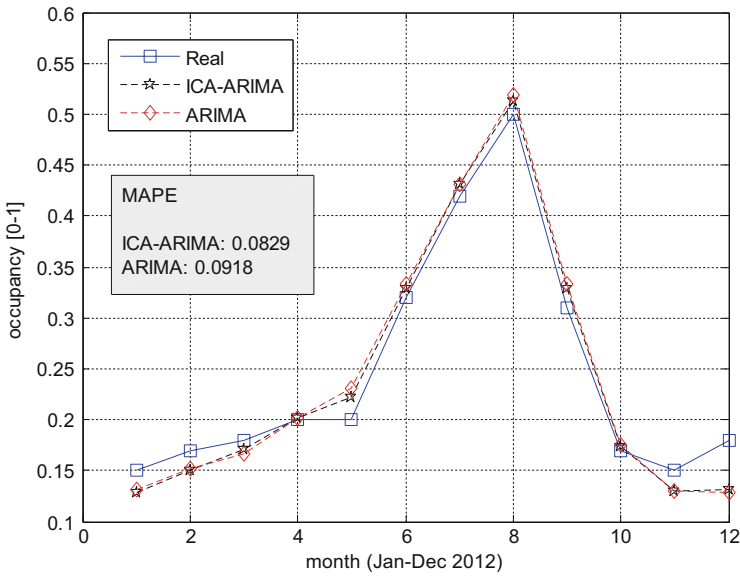
In order to estimate the dimensionality of the DE step, we performed extensive experiments using different values of  $N$  (that equals the number of estimated independent components) varying from 2 to 20. Then forecasting was performed for a fixed prediction step of 3, 6, and 12 months and the MAPE and RMSE errors were calculated for the ICA-ARIMA and the classic ARIMA technique (ARIMA (2,1,2) Model with Seasonal AR(12) and MA(12)). Results have shown that the performance of the proposed method is best for  $N = 5$ , and it remains constant for values of  $N$  up to 10 while it deteriorates for values greater than 10. Therefore, the value of  $N = 5$  was used throughout our experiments that ensures the best performance as well as the smallest computational complexity.

The proposed method's performance was initially tested by using the first 84 data points (84 months—7 years from 2005 to 2011) for training purposes and the remaining 12 data points (12 months—1 year, 2012) were forecasted using the proposed ICA-ARIMA as well as the ARIMA forecasting technique. The performance of both methods was compared using the prediction error measurements presented in Table 1. In Fig. 3, the forecasting of the last year (2012) is presented for the two aforementioned methods as well as the actual monthly data. It is clear

**Table 1** Performance indices and their calculations

Metrics	Calculation
MAPE	$\frac{1}{n} \sum_{i=1}^n \left  \frac{P_i - A_i}{A_i} \right $
RMSE	$\sqrt{\frac{1}{n} \sum_{i=1}^n (P_i - A_i)^2}$

$A_i$  and  $P_i$  present the actual and the predicted values

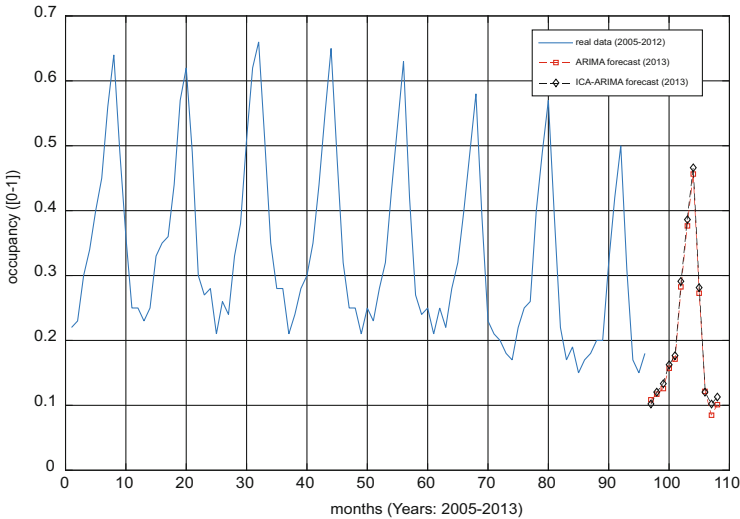


**Fig. 3** Occupancy prediction for the year 2012

that the proposed method works well and slightly better than the ARIMA technique, as the MAPE as well as the RMSE indexes indicate (MAPE: ICA-ARIMA:0.0829, ARIMA: 0.0918, RSME: ICA-ARIMA:0.0193, ARIMA:0.0235). Both algorithms were further used to predict the next year’s hotel occupancy for 2013. The results are shown in Fig. 4. In Tables 2 and 3 we present analytically the forecasted occupancy values for the year 2012 as well as the forecasts for the year 2013 with the proposed method as well as the ARIMA prediction model.

The efficacy of the proposed ICA-ARIMA method was further investigated by calculating the forecasting prediction error using different cases of prediction steps varying from 3 to 48 months (4 years), and compared to the traditional ARIMA forecasting method that was applied on the original observed time series.

The two types of prediction error measurements (MAPE and RMSE) are presented in the following three Figures with respect to different prediction steps. It is clear that the proposed ICA-ARIMA method outperforms the ARIMA forecasting technique especially when the prediction step increases. Furthermore, it is clear that the proposed method’s performance does not depend on the size of the



**Fig. 4** Occupancy prediction for the year 2013

prediction step as in the case of the ARIMA. The proposed ICA-ARIMA technique shows a mean value of the MAPE prediction error  $0.0713 \pm 0.0077$  while the ARIMA technique shows a mean error value  $0.2335 \pm 0.3679$ . For the ICA-ARIMA technique the mean RMSE prediction error was found  $0.0203 \pm 0.0021$  while in the case of the ARIMA  $0.0655 \pm 0.1059$ .

In addition, the proposed method works better than the traditional ARIMA technique when used to estimate tourism demand on the high touristic season (June–September), where the mean prediction error (estimated by taking into account only these predicted months) is also invariable of the prediction step and smaller than the average error ARIMA technique presents as Fig. 5 shows ( $0.0101 \pm 0.0024$  for the ARIMA-ICA method, compared to  $0.0373 \pm 0.0719$  for the ARIMA model) (Figs. 6 and 7).

## 4 Conclusion

In this paper we have proposed a new technique to forecast tourism demand from observed time series. The proposed technique projects the data into an orthogonal space using Independent Component Analysis (ICA) combined with Dynamical Embedding to transform the observed time series into a higher dimensional space, and performs forecasting in every Independent Component separately using the ARIMA prediction technique. The forecasted components are then combined in order to move back into the time series space and finally estimate the forecasted time series. Experiments on measures of the occupancy of all tourist

**Table 2** Predicted occupancy values for the year 2012

Month (2012)	ICA-ARIMA	ARIMA	REAL value	DIFF_ICA-ARIMA	DIFF_ARIMA
1	0.1281	0.1317	0.15	0.0219	0.0183
2	0.1502	0.1517	0.17	0.0198	0.0183
3	0.1704	0.1666	0.18	0.0096	0.0134
4	0.2022	0.2015	0.2	0.0022	0.0015
5	0.2219	0.2315	0.2	0.0219	0.0315
6	0.3288	0.3334	0.32	0.0088	0.0134
7	0.4315	0.4317	0.42	0.0115	0.0117
8	0.5124	0.5182	0.5	0.0124	0.0182
9	0.3288	0.3329	0.31	0.0188	0.0229
10	0.1733	0.1748	0.17	0.0033	0.0048
11	0.1301	0.1295	0.15	0.0199	0.0205
12	0.1321	0.1281	0.18	0.0479	0.0519

**Table 3** Predicted occupancy values for the year 2013

Month (2013)	ICA-ARIMA	ARIMA
1	0.1018	0.1089
2	0.1205	0.1169
3	0.1335	0.1260
4	0.1622	0.1571
5	0.1770	0.1711
6	0.2910	0.2830
7	0.3863	0.3764
8	0.4666	0.4566
9	0.2816	0.2724
10	0.1200	0.1212
11	0.1020	0.0849
12	0.1130	0.1006

accommodation (except from camping sites) in the Region of Western Greece from January of 2005 till December 2012, have proved the efficacy of the proposed method, tested using a wide range of prediction steps compared to the classic ARIMA forecasting method. The prediction error was found to be significantly smaller and almost invariant for a wide range of prediction steps. Furthermore, the proposed method performs well when used to forecast tourist accommodation in high tourism seasons (June–September).



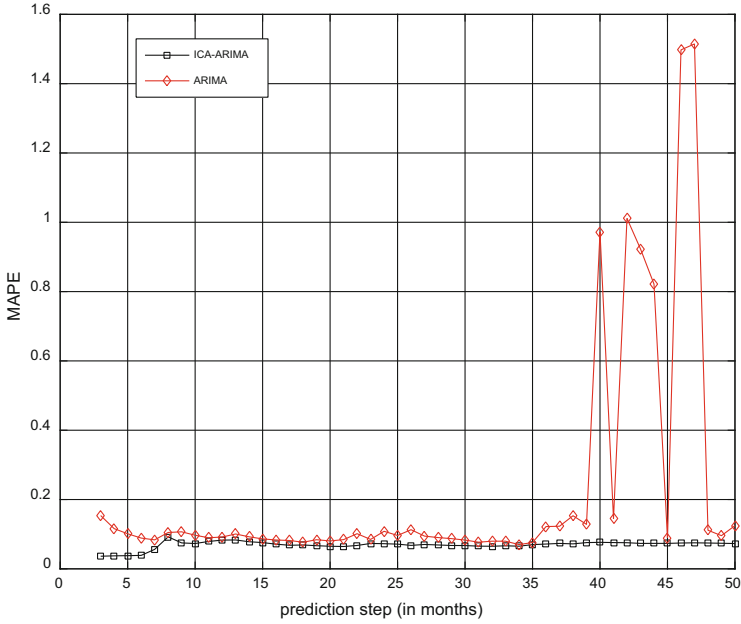


Fig. 5 The MAPE error for the ICA-ARIMA and the ARIMA forecast method

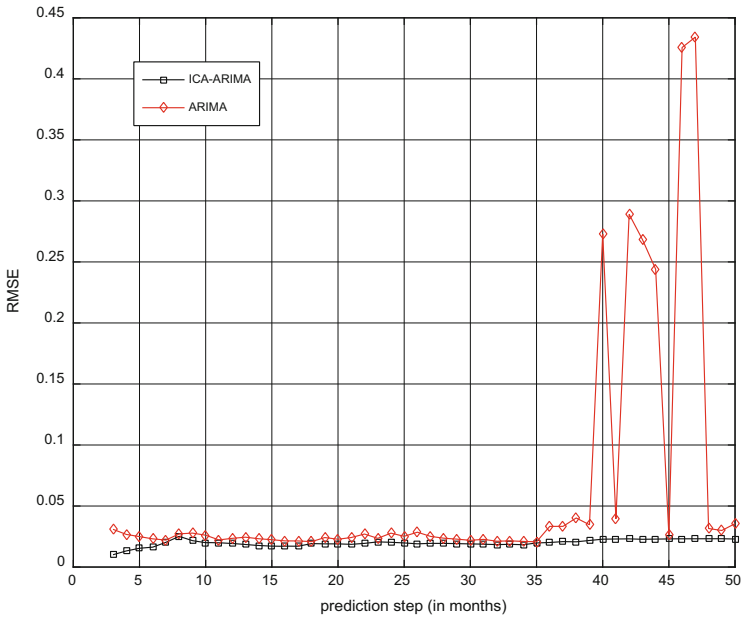
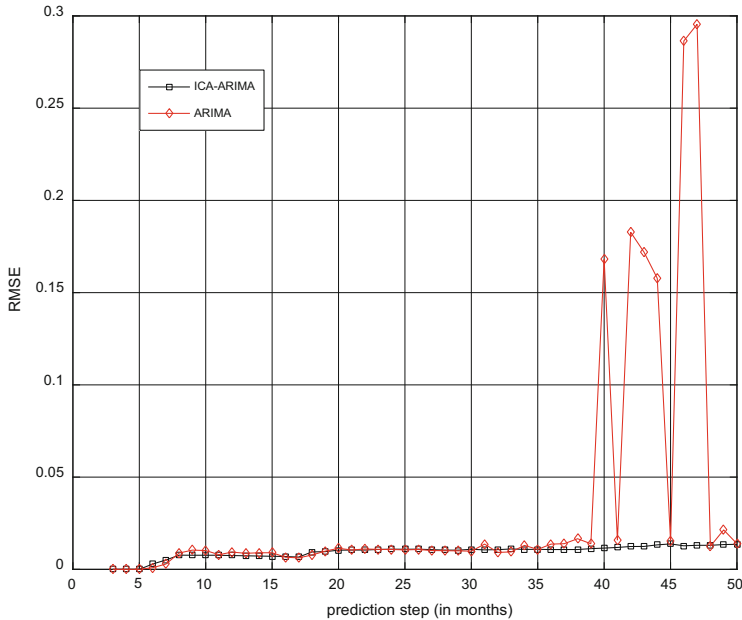


Fig. 6 The RMSE error for the ICA-ARIMA and the ARIMA forecast method



**Fig. 7** The RMSE error for both prediction methods and the high tourist season (June–September)

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The data that involves the monthly occupancy of all tourist accommodations of both foreign and domestic tourists came from the official records of the Hellenic Statistical Authority (EL. STAT., [www.statistics.gr](http://www.statistics.gr)).

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# Evaluating the Performance of Linear and Nonlinear Models in Forecasting Tourist Occupancy in the Region of Western Greece

Athanasios Koutras, Alkiviadis Panagopoulos, and Ioannis A. Nikas

**Abstract** Accurate tourism demand forecasting systems are very important in tourism planning, especially in high tourist countries and regions within. In this paper we investigate the problem of accurate tourism demand prediction using nonlinear regression techniques based on Artificial Neural Networks (ANN). The relative accuracy of the Multilayer Perceptron (MLP) and Support Vector regression (SVR) in tourist occupancy data is investigated and compared to simple Linear Regression (LR) models. The relative performance of the MLP and SVR models is also compared to each other. For this, the data collected for a period of 8 years (2005–2012) showing tourism occupancy of the hotels of the Western Region of Greece is used. Extensive experiments have shown that the SVM regressor with the RBF kernel (SVR-RBF) outperforms the other forecasting models when tested for a wide range of forecast horizon (1–24 months) presenting very small and stable prediction error compared to SVR-POLY, MLP, as well as the simple LR models.

**Keywords** Support Vector Regression • Multilayer Perceptron • Artificial Neural Networks • Tourism demand forecasting • Forecasting model • Western Greece tourism • Time-series

## 1 Introduction

Nowadays, being a traveler means, in a few words, a consumer of tourist product. The tendency for expending in such products, as, e.g., airplane tickets, food and beverage services, overnight stays and museum visits emerges by the need of modern man to travel along the world for business, educational and entertainment reasons.

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Nevertheless, the nature of tourism, as a dynamic system, depends strongly in many unequable and uncertain characteristics delivering a changeable and perishable product.

It is clear now, more than never, the importance of tourism industry globally, let alone in small countries with a significant percentage of their revenue be coming from tourism, like Greece. Moreover, new technologies gave the opportunity to many local economies to promote their local products globally, expecting a bigger share not only from the local but, also, from the global tourist market.

At the opposite side, the travelers, the consumers of tourism product, seem to develop a more perceptive personality in choosing their destinations; their consumption decisions are turned into less predictable and more spontaneous, driving their choices mostly from the need and desire for new experiences (Burger, Dohnal, Kathrada, & Law, 2001).

So, the most important issue arising from all the above is how we can exploit the present experience in order to make better decisions for tomorrow; in the tourism industry this is a crucial step for success. Evidently, any undisposed tourist “merchandise” cannot be stocked in order to be offered again in a next season in the tourist market. For example, empty rooms or unsold airplane tickets consist in lost revenue and probably in a strong indication of a bad planning. Hence, it is a great necessity for the tourist industry to have an a priori knowledge for the expected tourist arrivals to be able to schedule the flights, the hotel and room availability, the necessary employees etc. Unfortunately we are not able to know the future, but we can adapt forecasting processes to predict the behavior of future events (Franses, 2004; Frees, 1996; Makridakis & Hibon, 1979).

The importance of developing reliable and accurate forecasting models is a crucial step for the decision makers. What really matters is the knowledge of the size, directions and characteristics of future international tourist flows (Shahrabi, Hadavandi, & Asadi, 2013). Accurate forecasting models in both short- and long-term periods are considerable important for the effective formulation and implementation of tourism strategies (Song, Gao, & Lin, 2013) in various tourist organizations and business, in both public and private sector. Actually, accurate and reliable forecasting models are the key to the success of the whole tourism industry (Gunter & Önder, 2015).

In this work a forecasting model for the tourist occupancy in the area of Western Greece is presented. The Western Greece region consists of three dissimilar prefectures (Achaia, Iiia, Aitolokarmania) regarding the type of the visiting tourists, the available resources and infrastructures and the level of development and employment (Panagopoulos & Panagopoulos, 2005). However, despite the heterogeneous geographic morphology and economic activity, the overall region retains the same characteristics of a tourist destination, that is, the suggestibility in various exogenous factors as well as the considerable contribution to the local and country economy.

The basic reason, motivating this work, is from the one hand the finance crisis in Greece and a question about the viability of local tourist industry and from the other hand the poor research made in this area about the future and the perspectives of

tourism. The only known work for the area of Western Greece is the paper of Panagopoulos and Panagopoulos, who proposed a forecasting model for predicting the tourist occupancy in the West Greece area using the Box-Jenkins Method (Box & Jenkins, 1976) and monthly data from January 1990 to December 1999, forecasting for 2 years (Panagopoulos & Panagopoulos, 2005). Hence, the study of the West Greece region constitutes a strong research motivation and any suggestions in the direction of modeling the overall local tourist product circulation remains a well-timed issue for both researchers and local authorities.

Generally, for the problem of forecasting time-series different methods and techniques have been proposed covering a wide range of different countries and locations, as well as different time intervals. The most widely used models (especially using monthly data) are univariate or time-series models (Gunter & Önder, 2015). The most widely used technique in this framework is the (Seasonal) Autoregressive (Integrated) Moving Average models (Box & Jenkins, 1976). Recently, some new, well performed, time-series models have been proposed such as the Exponential Smoothing models (Hyndman, Koehler, Ord, & Snyder, 2008; Hyndman, Koehler, Snyder, & Grose, 2002), and a low cost inferential model (Psillakis, Panagopoulos, & Kanellopoulos, 2009); multivariate or Econometric models are also employed, such as Autoregressive Distributed Lag Models (Dritsakis & Athanasiadis, 2000; Ismail, Iverson, & Cai, 2000), Error Correction Models (Kulendran & Witt, 2003; Roselló, Font, & Roselló, 2004), Vector Autoregressive models (Shan & Wilson, 2001; Witt, Song, & Wanhill, 2004) and Time-Varying Parameter models (Li, Song, & Witt, 2006; Song & Witt, 2006); some artificial intelligence methods were, also, used (Chena & Wang, 2007; Claveria & Torra, 2014; Hernández-López & Cáceres-Hernández, 2007; Kon & Turner, 2005; Palmer, Montaño, & Sesé, 2006). An exhaustive review on forecasting time series can be found in (Song & Li, 2008).

According to the review work of Song and Li (Song & Li, 2008) on tourism demand modeling and forecasting, there exists no single model that can be used in all situations in terms of performance and forecasting accuracy. Furthermore, Coshall and Charlesworth (2010) report that tourism demand forecasting can be achieved with causal econometric models (ECM models, VAR models, LAIDS models etc), and non-casual time series models. In the latter case, the most widely used techniques are the ARIMA (Goh & Law, 2002) and the Exponential Smoothing (ES) models (Cho, 2003). However, during the last years, Artificial Neural Networks (ANN) have made their appearance into solving the tourism forecasting problem (Kon & Turner, 2005; Palmer et al., 2006).

The increasing interest in more advanced prediction models, together with the fact that tourism is a leading industry worldwide, contributing to a significant proportion of world production and employment, has lead us to evaluate the forecasting performance of the most significant ANNs. In this work we have used different forecasting horizons and compare the performance of the different ANNs architectures on the prediction problem of tourism demand as it is described by the occupancy of hotels in the Region of Western Greece.

The purpose of the paper is to evaluate the forecasting performance of the Multilayer Perceptron (MLP), and the Support Vector Regressor based on polynomial (SVR-POLY) as well as Radial Basis Functions Kernels (SVR-RBF), two of the most widely known network architectures in the literature. The Support Vector Regressor network uses a structural risk minimization principle that attempts to minimize the upper bounds of the generalization error rather than minimizing the training error as classic neural networks do (Vapnik, Golowich, & Smola, 1996). The generalization error is defined as the expected value of the square of the difference between the learned function and the exact target (mean square error), while the training error is calculated as the average loss over the training data. In this work we have used official statistical monthly data of the hotels occupancy in the Western Greece Region from 2005 until 2012 taken from the official records of the Hellenic Statistical Authority. Then the MAPE and the RSME is computed for different forecast horizons ranging from 1 to 24 months (2 years prediction).

The structure of the paper is as follows: In the next section we briefly present the theoretical background of the utilized neural network forecast models. The experimental setup as well as the data set is described in Sect. 3. In Sect. 4 the results of the forecasting are presented and discussed and finally in Sect. 5 some conclusions and remarks are given.

## 2 Methodology

### 2.1 Multilayer Perceptron Regressor

An Artificial Neural Network (ANN) is a non-linear black box statistical approach. The most commonly used ANN structure is the feed-forward multilayer perceptron (MLP). This structure is composed of at least three layers: an input layer, one or more hidden layers and an output layer. The network consists of a set of neurons connected by links and normally organized in a number of layers. The number of neurons in the input and output layer is equal to the number of input and output variables respectively. The number of neurons in the hidden layer(s) is usually selected by trial-and-error. The output of this network can be calculated by the following equation:

$$Y_j = f \left( \sum_i w_{ij} X_{ij} \right), \quad (1)$$

where  $Y_j$  is the output of node  $j$ ,  $f(\cdot)$  is the transfer function of the network,  $w_{ij}$  are the connection weights of the network that need to be estimated between nodes  $j$  and  $i$  and  $X_i$  is the input. The MLP uses the well-known Back Propagation learning algorithm to estimate adaptively the values of the network's weights. In order to do this, it minimizes the square error between the calculated and the desired network's



output based on a steepest descend technique with the addition of a momentum weight/bias function, which calculates the weight change for any given neuron at each iteration step. By considering that the prediction error is given by the following equation

$$E = \frac{1}{2} \sum_p \sum_j [O_j^p - Y_j^p]^2, \quad (2)$$

the adaptation rule for estimating the values of the weights is given by:

$$\Delta w_{ij}^p(n) = -n \frac{\partial E(n)}{\partial w_{ij}^p} \quad (3)$$

The above equation after applying the chain rule of differentiation leads to the following rule

$$\begin{aligned} \Delta w_{ij}^p(n) &= \mu e_j^p(n) X_i^{p-1}(n) + m \Delta w_{ij}^p(n-1) \\ \Delta w_{ij}^p(n+1) &= w_{ij}^p(n) + \Delta w_{ij}^p(n), \end{aligned} \quad (4)$$

where  $e_j^p(n)$  is the  $n$ th error signal at the  $j$ th neuron in the  $p$ th layer,  $X_i^{p-1}(n)$  is the output signal of neuron  $i$  at the layer below,  $\mu$  is the learning rate, and  $m$  is the momentum factor. The last two parameters are specified at the start of the training procedure and affect the speed and stability of the convergence of the steepest descend algorithm.

In brief, the procedure to set-up a MLP neural network to solve the regression problem is:

- (1) Select the number of the input data points and define the input layer.
- (2) Select the number of the output points and define the output layer.
- (3) Determine the number of the hidden layers as well as the number of the nodes in each layer. There is no rule for this task; this may depend on trial and error.
- (4) Perform learning from a set of known data. This step results in estimating the weights of the connections between the nodes of all layers of the network.
- (5) Test the neural network using known data that have never been presented to the network in step (4). In this way we can measure the accuracy as well as the efficacy of the network using various metrics (mean square error, mean absolute percentage error etc).

## 2.2 Support Vector Regression

The support vector regression (SVR) is a recent adaptation of the classification scheme based on support vector machines. The general regression problem can be

formulated as follows: Consider a set of data points  $D = \{(\mathbf{x}_i, q_i)\}_{i=1}^n$ , where  $\mathbf{x}_i$  is a vector of model inputs,  $q_i$  is the actual value that is a scalar and  $n$  the total number of data patterns. The purpose of the regressor is to estimate a function  $f(\mathbf{x})$  that can predict the desired values  $q_i$  given a set of input samples.

A regression function is given in the form of  $q_i = f(\mathbf{x}_i) + \delta$ , where  $\delta$  is the error that follows the normal distribution. Support Vector regression deals with the most general and difficult non-linear regression problem. In order to solve the non-linear regression problem, the SVR maps non-linearly the inputs into a high dimensional space where they are linearly correlated with the outputs. This is described by:

$$f(\mathbf{x}) = (\mathbf{v} \cdot \Phi(\mathbf{x})) + b, \quad (5)$$

where  $\mathbf{v}$  is a weight vector,  $b$  is a constant,  $\Phi(\mathbf{x})$  denotes the non-linear function. So, in SVR, the problem of nonlinear regression in the lower dimension space is transformed into an easier linear regression problem in a higher dimension feature space.

For solving this problem the most commonly used cost function is:

$$L_e(f(\mathbf{x}), q) = \begin{cases} |f(\mathbf{x}) - q| - \varepsilon, & \text{if } |f(\mathbf{x}) - q| \geq \varepsilon \\ 0, & \text{otherwise} \end{cases}, \quad (6)$$

where  $\varepsilon$  is the precision parameter that represents the radius of the tube located around the regression function  $f(\mathbf{x})$  and  $t$  is the target value.

The weight vector  $\mathbf{v}$  as well as the constant  $b$  can be estimated by minimizing the following risk function:

$$R(C) = C \frac{1}{n} \sum_{i=1}^n L_e(f(\mathbf{x}_i), q_i) + \frac{1}{2} |\mathbf{w}|^2 \quad (7)$$

where  $L_e(f(\mathbf{x}), q_i)$  is the loss function,  $\frac{1}{2} |\mathbf{w}|^2$  is the regularization term which controls the trade-off between the complexity and the approximation accuracy of the model,  $C$  is the regularization constant. Both  $C$  and  $\varepsilon$  are determined by the user in a trial and error manner.

By using slack variable  $\xi_i$  and  $\xi_i^*$ , the previous equation is transformed into the constrained form:

minimize:

$$R_{reg}(f) = \frac{1}{2} |\mathbf{w}|^2 + C \sum_{i=1}^n (\xi_i + \xi_i^*) \quad (8)$$

subject to:

$$\begin{cases} q_i - (\mathbf{w} \cdot \Phi(\mathbf{x}_i)) - b \leq \varepsilon + \xi_i \\ (\mathbf{w} \cdot \Phi(\mathbf{x}_i)) + b - q_i \leq \varepsilon + \xi_i^* \\ \xi_i, \xi_i^* \geq 0, i = 1 \dots n \end{cases} \tag{9}$$

By using Laplace multipliers and the Karush-Kuhn-Tucker conditions to the equation, it results to the following dual Lagrangian form, maximize:

$$\begin{aligned} L_d(a, a^*) &= -\varepsilon \sum_{i=1}^n (a_i^* + a_i) + \sum_{i=1}^n (a_i^* - a_i)q_i \\ &\quad - \frac{1}{2} \sum_{i=1}^n (a_i^* - a_i)(a_i^* - a_j) \mathbf{K}(\mathbf{x}_i, \mathbf{x}_j), \end{aligned} \tag{10}$$

subject to the constrains,

$$\begin{cases} \sum_{i=1}^n (a_i^* - a_i) = 0 \\ 0 \leq a_i \leq C, i = 1 \dots n \\ 0 \leq a_i^* \leq C, i = 1 \dots n \end{cases} \tag{11}$$

The Lagrange multipliers satisfy the equality  $a_i^* a_i = 0$ . The Lagrange multipliers,  $a_i^*, a_i$  are calculated and an optimal desired weight vector of the regression hyperplane is

$$\mathbf{v}^* = \sum_{i=1}^n (a_i - a_i^*) \mathbf{K}(\mathbf{x}_i, \mathbf{x}_j). \tag{12}$$

Hence the general form of the regression function can be written as

$$f(\mathbf{x}, \mathbf{v}) = f(\mathbf{x}, a_i, a_i^*) = \sum_{i=1}^n (a_i - a_i^*) \mathbf{K}(\mathbf{x}_i, \mathbf{x}_j) + b \tag{13}$$

where  $\mathbf{K}(\mathbf{x}_i, \mathbf{x}_j)$  is the kernel function. The values of the kernel function equals the inner product of the vectors  $\mathbf{x}_i, \mathbf{x}_j$  in the feature space  $\Phi(\mathbf{x}_i), \Phi(\mathbf{x}_j)$ .

Several choices for the kernel function exist, the two most widely known and used in the literature are the radial basis function (SVR-RBF) defined as  $\mathbf{K}(\mathbf{x}_i, \mathbf{x}_j) = \exp\left(\frac{-\|\mathbf{x}_i - \mathbf{x}_j\|^2}{2\sigma^2}\right)$  and the polynomial kernel (SVR-POLY) function defined as  $\mathbf{K}(\mathbf{x}_i, \mathbf{x}_j) = (\mathbf{x}_i^T \cdot \mathbf{x}_j + c)^d$ , with  $d$  the degree of the polynomial.

### 3 Experimental Setup

#### 3.1 *Multilayer Perceptron Regressor*

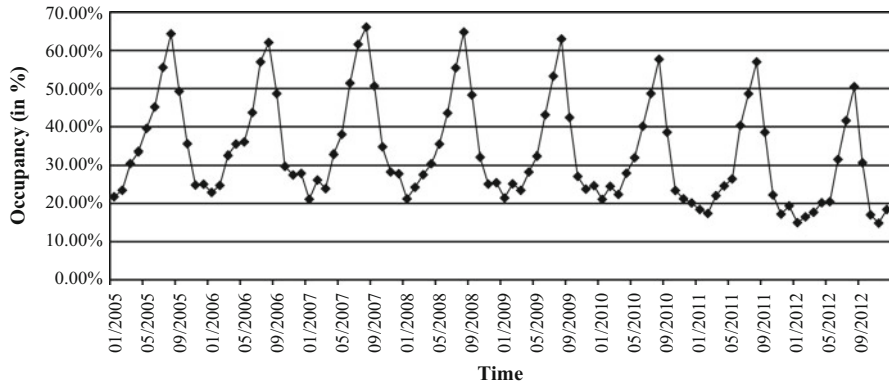
The main objective in designing the MLP model's architecture is to find the optimal architecture that will model the relationship between input and output (forecasted) values. The number of neurons in the input layer equals the number of the dimensionality of the input data, while the number of neurons in the output layer is equal to the number of the output data. In forecasting the tourist occupancy of the hotels in the Region of Western Greece, we have used a 12-dimensional input vector that holds the occupancy values in a history window of a year (12 months). The number of the neurons in the hidden layer is selected by trial-and-error procedure. In this paper, we have tested the efficacy of the MLP network using a wide range of neurons in the only hidden layer from 1 to 50. Experiments have shown that the MLP network performs best (smaller error) with 22 nodes in the hidden layer. For training this type of neural network we have used the Levenberg-Marquardt algorithm.

#### 3.2 *Support Vector Regressor*

The first step in using the SVR is the selection of the Kernel function. In this paper we have tested the forecasting performance for the polynomial (SVR-POLY) as well as the RBF (SVR-RBF) kernel function presented in the previous section. The performance of the proposed RBF regressor depends on the values of the kernel function parameters. Thus the selection of three parameters, regularization constant  $C$ , loss function  $\epsilon$  and  $\sigma$  (the width of the RBF) of a SVR-RBF regressor, as well as the selection of the regularization constant  $C$ , loss function  $\epsilon$  and  $d$  (the degree of the polynomial) of a SVR-POLY regressor is crucial for accurate forecasting. As there exists no general rule for selecting these parameters, this is usually based on the grid search method proposed by Lin, Hsu, and Chang (2003). The grid search method is a straightforward method that uses exponentially growing sequences of  $C$  and  $\epsilon$  to estimate the best parameter values. The parameter set  $C$ ,  $\epsilon$  that generates the minimum forecasting RMSE and MAPE error is considered as the best parameter set and used throughout the experiments. In our work, we have used the (100, 0.1) for the SVR-RBF and (100, 1) for the SVR-POLY regressor.

#### 3.3 *Experimental Dataset*

For evaluating the performance of the utilized forecasting methods, the occupancy of all tourist accommodations (except from camping sites) in the Region of Western



**Fig. 1** Monthly occupancies of all tourist accommodations (except from camping sites) from 2005 (1) to 2012 (12)

Greece that includes data from the Prefectures of Aitoloakarnania, Achaia and Hlia from January of 2005 till December 2012 was used. All data employed in this study were obtained from the official records of the Hellenic Statistical Authority. It is underlined that Hellenic Statistical Authority has not released any similar data for the period 2013 until now. There are a total of 96 data points in the dataset and the monthly occupancy series is plotted in Fig. 1. The plot exhibits a long-term of downward trend as well as a strong seasonality of 12 months with the maxima of the occupancy occurring during the high touristic summer season (maximum in August for every year).

In order to test the performance of the proposed method, the collected data is divided into two sets, training data and testing data. In order to further test the efficacy of the linear and non-linear prediction methods, we have calculated the prediction accuracy with a prediction step ranging from 1 to 24 months (2 years).

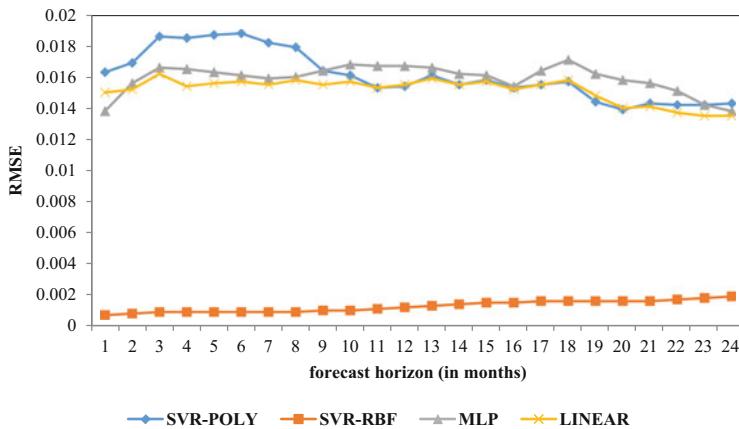
### 3.4 Performance Criteria

According to Tay and Cao (2001) and Thomason (1999), the prediction performance of our method is evaluated using measures including mean absolute percentage error (MAPE), and root mean square error (RMSE). MAPE and RMSE were used to measure the correctness of the prediction in terms of levels and the deviation between the actual and predicted values. The smaller the values, the closer the predicted values are to the actual values.

**Table 1** Performance indices and their calculations

Metrics	Calculation
<b>MAPE*</b>	$\frac{1}{n} \sum_{i=1}^n \left  \frac{P_i - A_i}{A_i} \right $
<b>RMSE</b>	$\sqrt{\frac{1}{n} \sum_{i=1}^n (P_i - A_i)^2}$

\* $A_i$  and  $P_i$  present the actual and the predicted values

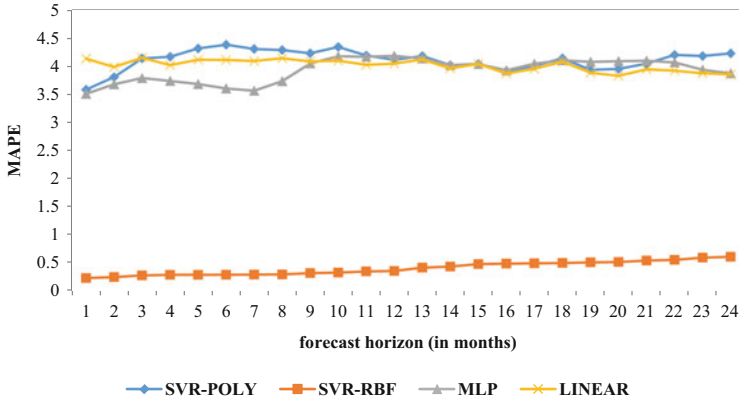


**Fig. 2** The RMSE error for various values of forecast horizon (1–24 months, for years 2011–2012)

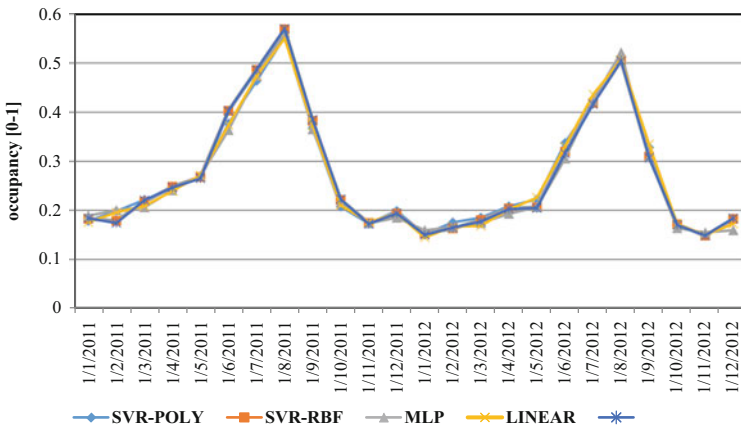
### 4 Experimental Results

The proposed method’s performance was tested by using the first 72 data points (72 months—6 years from 2005 to 2010) for training purposes and the remaining 24 data points (24 months—2 years, 2011–2012) were forecasted using the SVR-POLY, SVR-RBF, MLP as well as the LP forecasting networks. The performance of these methods was compared using the prediction error measurements (MAPE & RMSE) presented in Table 1. The errors were estimated for different values of prediction horizon ranging from 1 to 24 months for all regressors and the results are presented in Figs. 2 and 3. From these Figures it is clear that the SVR-RBF shows the best performance as it is clear that it can forecast accurately and robustly with very small forecasting error, almost constant that does not depend on the forecast’s time horizon (1–24 months) compared to the other three models.

In Fig. 4, the forecasting of the 2011–2012 years is presented for the four aforementioned methods as well as the actual monthly data. It is clear that the SVR-RBF network works well and significantly better than the other three techniques and manages to predict the actual occupancy values more accurately. For comparison reasons, in Table 2 we present analytically the forecasted occupancy



**Fig. 3** The MAPE error for various values of forecast horizon (1–24 months, for years 2011–2012)



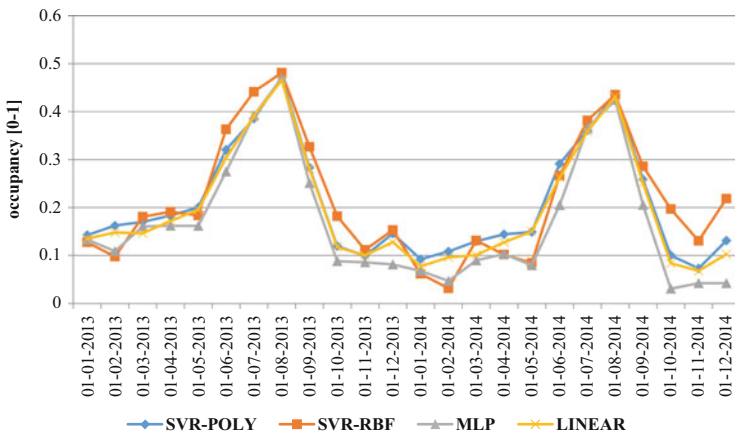
**Fig. 4** Occupancy prediction for the years 2011–2012

values for the years 2011–2012 estimated by the SVR-RBF, SVR-POLY, MLP, LR, together with the real values for this period of time.

Additionally, all four forecasting models were further tested to predict the next 2 year’s hotel occupancy for the years 2013–2014. The results are shown in Fig. 5, while in Table 3 we present analytically the forecasted occupancy values for this time period.

**Table 2** Predicted occupancy values for the years 2011–2012 (24 month prediction)

	SVR-POLY	SVR-RBF	MLP	LR	REAL
1/1/2011	0.1783	0.1826	0.1888	0.176	0.184
1/2/2011	0.1983	0.1783	0.2002	0.1955	0.174
1/3/2011	0.2215	0.2175	0.2061	0.2085	0.2207
1/4/2011	0.2435	0.2479	0.2408	0.2393	0.2463
1/5/2011	0.2669	0.2676	0.2707	0.2715	0.2647
1/6/2011	0.3767	0.4026	0.3636	0.3736	0.403
1/7/2011	0.4637	0.4858	0.474	0.4731	0.4863
1/8/2011	0.5524	0.5689	0.5626	0.5501	0.5697
1/9/2011	0.3676	0.3824	0.365	0.3729	0.385
1/10/2011	0.2074	0.2212	0.2156	0.2101	0.2227
1/11/2011	0.1733	0.1741	0.1735	0.1762	0.1723
1/12/2011	0.1989	0.1935	0.1848	0.1938	0.1937
1/1/2012	0.1517	0.1522	0.1595	0.1445	0.15
1/2/2012	0.1755	0.163	0.1655	0.1668	0.165
1/3/2012	0.1851	0.18	0.1739	0.1682	0.177
1/4/2012	0.2082	0.204	0.193	0.202	0.2023
1/5/2012	0.2223	0.206	0.2064	0.2258	0.2047
1/6/2012	0.3372	0.3195	0.3055	0.3305	0.3157
1/7/2012	0.4238	0.4186	0.4247	0.436	0.416
1/8/2012	0.5047	0.5054	0.5215	0.5069	0.5047
1/9/2012	0.3283	0.3094	0.3077	0.3346	0.307
1/10/2012	0.1679	0.1716	0.1637	0.1721	0.1703
1/11/2012	0.149	0.1483	0.1549	0.1498	0.1487
1/12/2012	0.1825	0.1823	0.1595	0.1725	0.184



**Fig. 5** Occupancy prediction for the years 2013–2014



**Table 3** Predicted occupancy values for the years 2013–2014 (24 month prediction)

	SVR-POLY	SVR-RBF	MLP	LR
01-01-2013	0.1424	0.1277	0.1333	0.1353
01-02-2013	0.1623	0.0974	0.109	0.148
01-03-2013	0.1702	0.1807	0.1606	0.1464
01-04-2013	0.1835	0.1912	0.1618	0.1719
01-05-2013	0.2004	0.1834	0.1616	0.1956
01-06-2013	0.3206	0.3632	0.2748	0.3039
01-07-2013	0.3855	0.4414	0.3922	0.3905
01-08-2013	0.4715	0.4812	0.4701	0.4654
01-09-2013	0.2833	0.3266	0.2511	0.281
01-10-2013	0.1195	0.1818	0.0882	0.1174
01-11-2013	0.0994	0.1118	0.0858	0.0999
01-12-2013	0.1456	0.1531	0.0812	0.1282
01-01-2014	0.0921	0.0618	0.068	0.0774
01-02-2014	0.1084	0.0315	0.0469	0.0959
01-03-2014	0.1296	0.1313	0.0898	0.1008
01-04-2014	0.1441	0.102	0.103	0.1275
01-05-2014	0.149	0.0847	0.0794	0.1501
01-06-2014	0.2913	0.2666	0.2051	0.2624
01-07-2014	0.3613	0.3818	0.3653	0.3586
01-08-2014	0.4362	0.4352	0.4244	0.4311
01-09-2014	0.2585	0.286	0.2057	0.2507
01-10-2014	0.1002	0.1969	0.0307	0.0837
01-11-2014	0.0731	0.1306	0.0422	0.0679
01-12-2014	0.131	0.2186	0.0422	0.1025

## 5 Conclusion

In this paper we have presented an evaluation of the forecasting performance of two of the most widely known Artificial Neural Networks ANN architectures, the Multilayer Perceptron (MLP), and the Support Vector Regressor based on polynomial (SVR-POLY) as well as Radial Basis Functions Kernels (SVR-RBF). For our experiments we have used official statistical monthly data of the hotels occupancy in the Western Greece Region from 2005 until 2012 taken from the official records of the Hellenic Statistical Authority. Then the MAPE and the RSME is computed for different forecast horizons ranging from 1 to 24 months (2 years prediction, 2011–2012). The SVR that uses RBF kernels provides better performance than the other artificial neural networks architectures tested in this paper, when applied to solve the tourism forecasting problem. In the tourism industry, tourism service providers should assess the costs and benefits of each model before choosing one for forecasting. This has significant managerial implications when it comes to constructing a strategic plan for marketing. With the accurate forecasted trends

and patterns that indicate the sizes of tourist demand, the government and private sectors can have a well-organized tourism strategy and provide a better infrastructure to serve the visitors and develop a suitable marketing strategy to gain benefit from the growing tourism (Shahrabi et al., 2013). Moreover, armed with accurate estimates of demand for tourism, tourism authorities and decision makers in the hospitality industries would be better able to perform strategic planning.

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The data that involves the monthly occupancy of all tourist accommodations of both foreign and domestic tourists came from the official records of the Hellenic Statistical Authority (EL. STAT., [www.statistics.gr](http://www.statistics.gr)).

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# HRM Specificities' on Portugal Hotel Units

Susana Silva and Dora Martins

**Abstract** This paper presents the main Human Resources Management (HRM) specificities' on Portuguese hotel units. We try to understand the role of HRM on behavior of co-workers and quality service in hotel units and to know the future tendency of human capital profile on Portuguese hotel units and the role of HRM function on management of their staff. We, also, try to explore if Portuguese culture has influence on HRM specificities' of hotel units. This phenomenon has a special relevance in the Portuguese context, because this country is known a growing process of tourism industry in recent years. Furthermore, little is known about HRM department' contributions to their human capital management and development. This paper is one of the first to focus specifically on Portuguese hotel units and it also seeks to present findings that stem from the Human Resources Managers' perspective. The paper is based on qualitative case studies. The data were collected through semi-structured interviews of 12 human resource managers from 12 hotel units located in Portugal. The results show that although there is not an effective HRM, current HRM practices are enough to encouraging pro-environmental behavior in their staff and they have a direct effect on customer satisfaction and competitiveness of sector. However, managers recognize there is need introduce some change on short-term to promote a better performance of staff with effect on customers satisfaction and competitiveness on sector in Portugal. According to these results, the paper discusses the major theoretical and practical implications.

**Keywords** Human resources management • Human capital • Tourism • Hotel industry • Portugal • Exploratory study

## 1 Introduction

Tourism has been recognized as a strategic sector for economic growth in many countries worldwide and recognized as one of the most important industries in the world. In the last 5 years this sector has registered positive growth, a trend that

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seems to remain over the next decade. According to the World Travel & Tourism Council (2014), the arrival of international tourists increased from 528 million in 1995 to 1087 million in 2013, and is expected to reach 1762 million in 2024. In addition, the statistics office of the European Union (EU)—Eurostat, confirms that in 2014 the number of nights spent in hotels units in the EU reaches a record number of 2.7 billion, 1.7 % more compared to 2013. Portugal contributes to an increase of 7.1 % in the number of overnight stays for a total of 53.4 million and is one of the three countries with the highest growth in tourism in the EU (Eurostat, 2014).

Particularly, Portugal was experienced a growth of 11.9 % (WTTC, 2014). The tourism sector is a particularly attractive option to stimulate development in rural and low income countries and regions that previously relied heavily on agriculture and natural resource extraction. Tourism development often provides the dual advantages of generating employment and income while promoting cultural heritage and traditions (WTTC, 2012).

In Portugal, tourism shows strong competitive advantages, with attractiveness factors, including geographic location, climate, historical and cultural heritage, gastronomy and wine, hospitality, diversity of supply (beach, city, golf, casinos, rurality, etc.), and security. According to these factors, and to the data available up to September 2013, Portugal totaled almost 50 distinctions in just 9 months, compared with about 15 awards and throughout the year 2012. These results show that, in 2013, tourism in Portugal won more than three times the premiums in 2012 ([www.turismodeportugal.pt](http://www.turismodeportugal.pt)) while was chosen as one of the best destinations in 2014 by the publisher Lonely Planet travel guides, appearing in the list of 'best value' countries considering the best quality/price ratio.

Many researchers have underscored the importance of customer-contact employees in creating and providing good service quality (Bitner, Boom, & Tetreault, 1990; Hartline & Ferrell, 1996; Kelley & Hoffman, 1997; Tsaur & Lin, 2004; Zeithaml, Parasuraman, & Berry, 1985). Furthermore, increased service quality through increased employee performance is a viable way for hotels to remain competitive (Tsaur & Lin, 2004).

According to previous literature, HRM practices contribute to improving organizational performance including turnover rate (Huselid, 1995), labor productivity (Datta, Guthrie, & Wright, 2003; Huselid, 1995; MacDuffie, 1995; Youndt, Snell, Dean, & Lepak, 1996), return on assets and return on equity (Delery & Doty, 1996), and profit margin (Kalleberg & Moody, 1994). Thus, HRM seems to gain strength in the hotel industry, because as consider Cho, Woods, Jang, and Erdem (2006) the emphasis of human resources to improve organizational performance has become stronger, not only because they cannot be easily imitated by competitors, but because they provide an effective and rapid response to market demands (Huselid & Becker, 1996; Prahalad & Hamel, 1990; Stalk, Evans, & Shulman, 1992). However, they are still few studies try understand the impact of HRM practices on organizational performance more precisely the role of HRM function on quality service and customer satisfaction through decreased turnover rates, increased labor productivity, and increased profit margin within the industry. Therefore, this study

explore the role of various HRM practices promoted on organizational performance in the Portuguese hotel units.

Important questions remain unanswered and motivated this study: (1) Is there a relationship between HRM practices and customers' service quality in hotel units? (2) Which HRM practices are most important to organizational performance? (3) What will be the future tendency of human capital profile on Portuguese hotel units? and (4) What will be change in HRM function on management of their staff in a short-time?

The purpose of this article is to present the results of an empirical study with Portuguese hotel units, presented outlining HR professionals' perceptions of the extent to which HRM practices are used and will be used in short-time, coupled with appropriate theoretical discussion, designed to answer these questions.

Finally, the first reason for focusing on this issue is because there are known any study that relates HRM and organizational performance on Portuguese hotel units. The second reason is the fact that the number of hotel units in Portugal is growing in recent years ([www.turismodeportugal.pt](http://www.turismodeportugal.pt)). Although tourism in an important driver of economic, social and cultural development in both developed and developing countries, there are few hotel units among best organizations to work. Last 2 years (2013 and 2014), just four hotel units were identified among the best place to work (according to Exame Magazine). To understand why not grown this number and not improved their positions is the third reason of this study. Finally, we try to explore which are the main problems related to HR on this specific industry (e.g., low qualification of HR and high seasonality).

The paper will have the following structure: In literature review section we will present the concepts of HRM and Portuguese tourism characteristics, and will expose some theories about the use of HRM in tourism industry. In section "Methodology" we will summarize the methodology. In section "Results" we will present the results and will discuss them in section "Conclusion". In section "Conclusion" we will present the conclusion, limitations and implications of the paper.

## **2 Literature Review**

### ***2.1 The National Cultural Influence in HRM Role***

The last decade of the past century brought significant changes in the labor market involving a new role for people in organizations. In this context where the HRM function gets a new perspective, with the primary responsibility to manage the most strategic resource of organizations, differentiating it from other resources (Bilhim, 2009). The HRM gains therefore an important role to strategy implementation in organizations and to the achievement of organizational goals (Barbosa, 2005). However, we cannot say that this development was uniform. A recent literature

review on HRM (e.g., Davis & Luiz, 2015; Tüselmann et al., 2014; Vaiman & Brewster, 2014) shows different specificities in this development according to the country or world region.

Gomes, Sahadev, Glaister, and Demirbag (2014) on a comparative analysis between multinationals European and Indian firms located on Southern African Development Community countries found, on the one hand that the Indian HRM function shifting from an emphasis on personnel towards a more strategic HR role but with a greater emphasis on HR development (Budhwar & Varma, 2010). However, HRM function remain less formal and less structured than European organizations (Budhwar, 2009). Some researchers (e.g., Rao, 2007; Saini & Budhwar, 2008; Som, 2007) underline that there are a strong influence of socio-cultural, political and economic factors on HRM policies and practices in Indian firms. Furthermore, Indian firms are influenced by the high collectivism and high power distance which favour personal and familial relationships over work outcomes (Budhwar & Khatri, 2001; Tymon, Stumpf, & Doh, 2010). As consequently, Indian firms appear to have high turnovers rates, problems on management, development and retention of talent (Bhatnagar, 2007; Cooke & Saini, 2010; Stumpf, Doh, & Tymon, 2010) On the other hand, several authors (e.g., Gomes et al., 2014; Sparrow & Hiltrop, 1997; Yan, 2003) consider HRM of European firms as a homogenous function, which have policies and practices influenced by a relatively long-term approach to business, resulting in long-term relations with employees moderated by trust and loyalty. Finally, Gomes et al. (2014) also show that the African-style HRM practices favouring collectivist and paternalistic practices over individualist and instrumentalist practices characteristic of MNEs from more developed countries (Horwitz, 2012, 2013; Horwitz & Smith, 1998; Newenham-Kahindi, 2013).

Whereas that culture is acquired knowledge that shapes values, originates attitudes and affects behaviour, and which members of a society (or a social group) use to interpret experience and generate social behaviour (Luthans & Doh, 2009; Vaiman & Brewster, 2014), Portugal has some distinct cultural idiosyncrasies of contexts that have been most widely studied (e.g., Asia, USA, Scandinavia, Spain, France, Holland, Germany, England, Russia). In Portugal there is a strong penchant for gender equality, collectivism of ingroup/family, uncertainty avoidance and power distance but less institutional collectivism, assertiveness, future orientation, performance orientation and human orientation (House et al., 1999; Jesuino, 2002). Some researchers (e.g., Bennett & Brewster, 2002, 2010) argue that the national culture can influence the organizational culture of Portuguese companies and their HRM function. Another important aspect that results from the study of Brewster and Bennett (2010) is the incomparability between organizational cultures of different countries (e.g., each country has specific rules that determine the performance of their companies). Brewster and Bennett (2010) underline the lack of planning and organization in the organizational culture of Portuguese companies. In reverse position, under the influence of German organizational management traits, the organizational culture of companies in the Czech Republic prevails good planning and organization. The same applies to Poland, where Brewster and

Bennett (2010) note that Polish organizations are evaluated more positively than the Portuguese organizations in the various analytical dimensions of organizational culture (i.e., transparency, hierarchy and teams, market orientation and customer, organization and planning, energy, creativity and adaptability; cross-cultural orientation and relational orientation). Specifically, the link with the hierarchy is more formal in Poland than in Portugal. These evidences lead Bennett and Brewster (2002) and (2010) to suggest that the more informality found in the organizational culture of Portuguese companies can explain the evidence of less planning and organization, less transparency in its management compared to the sample in countries of central and Eastern Europe. The lack of a clear leadership strategic results in short-term decisions and lack of planning of Portuguese companies. Top managers are more individualistic than cooperating in thinking and work, characterized the Portuguese managers as predominantly autocratic.

Following this argument, Portuguese literature (Cunha & Rego, 2008; Hofstede, 2001; House et al., 1999; Jesuino, 2002) suggests that organizational management practices namely HRM practices are influenced by national culture.

The Portuguese organizational model seems to be anchored (1) in a women's culture, i.e., a culture that values more personal relations, quality of life and caring for others and are more likely to stress the value of social rewards and less the assertiveness and competition (Hofstede, 1980); (2) with high power distance, i.e., members of organizations of high power distance cultures tend to accept that the power should be shared differently as there are inequalities between people in the same organization on the basis of hierarchical levels occupied. The relationship with the superior are formal. This trend in Portuguese culture explains the low participation of people in decision-making processes (Jesuino, 2002); (3) high uncertainty avoidance (Hofstede, 1980), and the unpredictability limited by a set of social norms and rules and; (4) with strong collectivism in group (Cunha & Rego, 2008; Hofstede, 1980; House et al., 1999), i.e., collectivist cultures there is likely to be a greater preference to work with others or in groups. Furthermore, the loyalty of individuals to organizations is unquestionable. From the point of view of work, leaders tend to promote institutional practices that encourage and reward workers' loyalty to the organization rather than develop the achievement of individual goals. According Rego and Cunha (2009), the employment relationship tends to develop in the framework of mutual obligations (i.e., protection in exchange for loyalty).

## ***2.2 Hotel Industry and HRM***

The hotel industry has become one the most important of all service industries in Portugal, where there is a high increasing growth in recently years. Furthermore, has an increased competition within this industry in Portugal. This increased competition has forced hotel units create strategies to retain current clients and to attract new clients.



In line with these arguments, improve a quality service through increase employee performance is the solution for this industry to remain competitive (Tsauro & Lin, 2004). Many researchers (e.g., Clark, 2005; Siebern-Thomas, 2005) say that job quality affects employee' job satisfaction and well-being and, consequently, affecting organizational performance. Considering that job quality is related to pay, job security, career opportunities, job variety, job autonomy, stress, physical effort, co-worker relationships (Adler & Adler, 2004; Green, Kler, & Leeves, 2010; Handel, 2005; Knox, Warhurst, Nickson, & Dutton, 2014), HRM function has an important role in hotel unit industry because in the generally of this industry there are low pay, low skills, poor training and career opportunities (Baum, 2007; Knox, 2010; Vanselow, Warhurst, Bernhardt, & Dresser, 2010). Nevertheless, HR scholars and practioners (Khatri, 2000; Morrison, 1996; Tsauro & Lin, 2004) suggest that HRM practices may create more satisfaction on job of employees. This satisfaction may have a positive impact on service quality (Tsauro & Lin, 2004). For example, on the four hotel units identified among the 100 Portuguese best place to work in 2014, all reasons for this classification are related to HRM practices (Revista Exame, 2015), namely a good package of benefits, worklife balance practices, training and development and reward the best performance.

As conclude Cho et al. (2006), the emphasis of human resources to improve organizational performance has become stronger, not only because they cannot be easily imitated by competitors, but because they provide an effective and rapid response to market demands. In addition, this contribution of HRM on performance organizational improve when organization promote their core competences, intellectual capital, organizational capability, high performance work systems, value-based teams and high performing teams (Huselid, 1995; Ulrich, Losey, & Lake, 1997). Thus, organizations and managers in the hotel industry face real challenges in recruiting, developing and maintaining a committed, competent, well-managed and well-motivated workforce which is focused on offering a high-quality (Nickson, 2013). Furthermore, in our days, the human potential is increasingly recognized as an essential asset for organizations, if scarce can jeopardize the future of organizations. For this reason, current and future organizations must assign to HR managers an essential role (Alis, Horts, Chevalier, Fabi, & Peretti, 2012) in particular those where employees are to be mobilized to ensure cooperation, the dynamism and the personal commitment in order to account the new demands of an increasingly competitive market. As referred by Nickson (2013), on the one hand, organizations and managers in the tourism and hospitality industry face real challenges in recruiting, developing and maintaining a committed, competent, well managed and well-motivated workforce which is focused on offering a high-quality 'product' to the increasingly demanding and discerning customer. On the other hand, having briefly considered the nature of the hospitality and tourism industry and the characteristics of its workforce attention now turns to understanding HRM and the increasingly important role it is felt to play in organizational success (e.g., more quality service and more competitive advantage). Thus, HRM role will be aimed at securing high-quality service, for example, HRM practices have an important role to play in developing capabilities that enable change toward

achieving sustainability and environment-related goals, ultimately helping organizations achieve long-term competitive advantage (Noe, Hollenbeck, Gerhart, & Wright, 2012). Particularly, some HRM practices may be effective at encouraging pro-environmental behavior in their staff (Zibarras & Coan, 2015). However, in this sub-sector economic remains yet the idea that has a general difficulty in retaining staff. Low pay and a lack of career structure and benefits are identified as mains reasons for changing employment (Nickson, 2013).

Underlying this debate, the connection between HRM practices and quality service motivate this study. Therefore, this study attempt to explore the importance of various HRM practices on organizational performance in the Portuguese hotel industry from HR managers' perspective.

Given that is great importance of HRM on performance organizational identified in the reviewed literature, the main focus of this study is to explore the role of this function at present and the future of Portuguese hotel industry, from the point of view of the HR managers of the hotel units include on our study. Bearing in mind the specifics of the organizational culture and the management practices of Portuguese hotel units, we think that there are some idiosyncrasies, which are examined in our study as described below.

### **3 Methodology**

#### ***3.1 Participants***

All the participants in our study were human resources managers in hotels units in Portugal. Twelve participants were interviewed during December 2014. The interview asked about their experiences in human resources management department in hotels units in order to understand the future trend of human capital in the tourism industry. The participants mean age was 41.34 years ( $SD = 9.23$ ), six (41.7 %) were female and seven (58.3 %) were male. Regarding to their marital status, eight (66.7 %) were married and four (33.3 %) were single. All the participants were Human Resources director in their hotels units; they were undergraduate in tourism and worked in this unit, in mean, at 8.9 years ago ( $SD = 4.3$ ).

#### ***3.2 Procedure***

The participants signed their informed consent forms for inclusion in the study and for audiotaping of the interviews. The interviews took place at the hotels units. All interviews, which lasted between 20 and 70 min, were audiotaped and transcribed verbatim. The interview schedule included open-ended questions, such as “*What will be the ideal profile of the future employee in the tourism industry?*”, “*How will*

*be the influence of human resources practices in the management of Portuguese hotels units, namely in career management and in the retention of employees? , and “How will be the role of Human Resources Management in Portuguese hotels units, in the future?”.*

### **3.3 Data Interpretation and Analysis**

#### **3.3.1 Interview Data Were Analyzed Using the Thematic Analysis Method**

The basic premise of thematic analysis is that the phenomena comprehension must emerge from the data rather than from preconceived notions formulated by the researcher. This must go beyond a purely descriptive account to a theoretical formulation of the phenomenon under research. The data collection and analysis were deliberately interweaved, i.e., theoretical sampling, so that subsequent questions could be revised to reflect and check the emergent categories. Theoretical saturation was used to compose the sampling.

The interviews were transcribed verbatim and analyzed with NVivo 10.0 software according to the constant comparative method. Following these guidelines, the first step of the analysis was open coding. Data were examined in order to identify the participants’ descriptions of thought patterns, feelings and actions related to the themes mentioned in the interviews. The codes were formulated in words closely resembling those used by the participants. This was an attempt to maintain the semantics of the data. Codes were compared to verify their descriptive content and confirm that they were grounded in the data. In a second step the codes were sorted into categories. This was done by constant comparisons between categories, and between categories, codes and interview protocols. Data collected at later stages in the study were used to add, elaborate and saturate codes and categories. The steps of analysis were not strictly sequential; rather, we moved forward and backward, constantly reexamining data, codes and categories.

Core categories were identified, allowing the attaching of all concepts together and unifying them allowing to understand the phenomena. To ensure the validity of the analysis and the coding process, a second researcher was consulted as auditor (an independent researcher that discuss and validate the categories) throughout the entire data analysis process to assist the primary author by challenging ideas and assisting in the construction of the categories.

## 4 Results

In order to understand the perception of HRM director of the hotel units on the future trends of human capital management in tourism semi-structured interviews were conducted. The analysis of these interviews revealed the following integrative categories: Future Professional Profile future for hotel units; Role of HRM Practices in hotel units; and the Future Role of HRM in the tourism industry. A more elaborate description of the results is presented in the rest of this section with participants' transcriptions to illustrate and facilitate understanding.

The ideal profile of the future collaborator in hotel units includes the requirements and skills for the professional activity in this industry. Concerning the category requirements emerge several qualities that aim to develop human ability as well as its customer orientation. That is, the professional ability of storytelling and create memories on the client. Regarding to behavioral dimension, emerges features such as: professional, friendly, humble, affable, available, organized, punctual, diligent, good communicator, sociable, adaptable, helpful and flexible. On the other hand, language domain is presented as a prerequisite and transculturality is a valuable dimension. As an example may be mentioned "*it is essential that the professional has the ability to tell stories, to create memories. In our days the customers are demanding and prefer places that create good feelings, remember it in a positive and enjoyable way*" (L), "*we value customer orientation, always focus on the customer, anticipate their needs, be friendly, sociable, adapt to situations*" (C).

The skills displayed by these professionals are defined by the area in which the employee exercises his activity. However, in order to analyze them comprehensively emerge skills such as initiative, proactivity, responsibility, dynamism, suitability and seriousness of the employee, as evidenced by the statement "*in this area, professionals need to be serious people, they have to be able to propose, take responsibility and, very important, it has to be a dynamic person who does and who is not waiting*" (A).

Within the skills emerge naturally the more technical and social-behavioral issues. In technical dimension are valued professional qualifications, with special emphasis on the importance of having a bachelor's or master's degree in the field as well as the prestigious school where the training was acquired. As an illustration, "*it is very important to have technical skills, the know-how. In this area, the requirements of each activity are completely different. The professional have to know about their professional area and in Portugal there are already good schools in tourism*" (I), and "*nowadays there is an increasing value for people who have a bachelor's or master's degree in the area, a good school that is, the certification has to be proven in this area*" (F). At the same time, emerged as important categories the domain of foreign languages described as essential for this area and the computer skills. In turn, social-behavioral dimension emerges from the value given to education, communication skills and adaptability, dynamism and description of the professional. This can be reinforced by the statements "*the language skills are, the*

*English need to be as fluent as the Portuguese, the knowledge of more languages is valued.”* (B), *“the proficiency of languages is very important, sometimes we do interviews in English”* (G), and *“in our group, we value communication skills, our client is looking for a discreet professional and a professional that knows how to behave in the situation”* (D).

Reporting to the role of HRM practices, this emerging category recruitment and selection, compensation and benefits, training, and career development are cited as the major practices in the field of hospitality.

Recruitment and selection is conceptualized in a way similar to what currently happens, it is not expected, in most situations, major changes in this procedure. However, with the need for globalization, emerging new tools for the application of this practice in particular with the use of new technologies. As an illustration it could be referred interviews by videoconference and the need to change procedures, that is, before the recruiters used newspapers, according to the function to recruit, currently the hotel units begin to make use of social networks and blogs of various technical specialties as prime locations to find certain professionals as it appears in quotes *“the process of recruitment and selection will not change much, much depends on the function for which we intend to recruit ... we have to look for people in places where they are”* (H), *“now it is beginning to be a more digital time before when we intended to recruit we putted ads in certain newspapers, now we have to rely on the various social networks, but also depends on the function”* (B).

The category compensation and benefits is characterized by an absence of change reporting to salaries and benefits being established a parallel with other areas of activity due to the situation of economic and financial crisis. However, it is recognized that, particularly in this area of activity, other benefits in addition to the base salary have a major role. These benefits integrate financial dimensions, which are described as more important and not financial dimensions. For example some strategies are presented as prizes for goals, social responsibility measures, health insurance, Christmas gifts, free stays/discount. On the other hand, several hotel units recognize the importance of setting goals for the different activities and establish the awards according to customer satisfaction. This could be illustrated with quotes *“the financial rewards from the customers in our hotel unit have a very large weight, and this turns out to be a great benefit to all, because in terms of wages there are no major changes”* (K), *“in addition to the salary question there are many other incentives that are important, Christmas parties, discounts for stays, a set of protocols with other entities and which employees can benefit ... do not give more money but we make people spend less”* (J).

Vocational training emerges as a central area in the role of HRM practices in the hotel unit. This category recognizes the necessity of having employees with basic technical training to be an ongoing practice, technical and behavioral, contributing to the quality of services. Vocational training is understood as an investment in the future with fast and high return. In this sense, it is very important to maintain all technical training update as well as the internal communication areas, commitment, shared responsibility, team building, languages, computer, in addition to other obliged themes according to Portuguese law. As an example *“vocational training*

*is very important, in addition to those required by law, always bet on the actions that enable the improvement of the soft skills such as languages and more behavioral issues” (A), “greatly appreciate the technical update, focus on training is essential and gives a great return” (E).*

The career development emerges from career management and retention of talent in this area of activity. The career management is mostly zigzag and vertical, recognizing that to be solid, needs to be based on merit. Thus, we recognize the importance of defining career paths, though not always exist due to industry seasonality. They allow mold and create professional to the real needs of hotel units depending on whether the will of the employees or the employer's will. However, despite the constraints of the sector try to mitigate the sector's seasonality effect by maintaining the active psychological contract establishing promise contracts, investing in continuous training of people even when they are not working with the hotel units and maintaining the various forms of communication (newspaper, newsletter ...). Although it is recognized that career development is not a huge embarrassment in this sector, HR managers identify him as a huge challenge that must be improved. As an example may be mentioned *“career management is very difficult given the enormous seasonality of this professional activity” (J), “is not a priority, does not mean that people cannot get in a function and then move to another, that had already happened, but this concern we do not have it” (C).* In turn, talent retention is not a practice with great importance in hotel units and appears linked to security, peace and recognition awarded by the organization and the fact that employees are focused on awards for goals and thus remains in organizations. Moreover, this difficulty is due to the huge turnover in the sector or by seasonality issues, low commitment to the organizations and the constant need to seek a more attractive and safe professional reality for employees. As an illustration, *“turnover in this field of activity is very large, sometimes people want to work here just to have in their curriculum that have worked on the X but here the pressure is too high and then cannot stand” (G).*

Finally, the category Future Paper of HRM in the hotel industry emerges from the characterization of this paper, retention of workers, and the sector's competitiveness.

Therefore, in the majority of hotel units participating in this study HRM are characterized as a central dimension being associated to an operating activity of day-to-day or an area of investment in the development and retention of employees to the extent that operational issues are fundamental to the proper functioning of the organization complemented by investment and recognition of people as a differentiating factor. Thus, we recognize the importance of contributing to employee motivation and HR as a differentiating element of the organization. As an example, *“is very important to invest in employees, keep them motivated and committed, this is what is expected of the HR function” (E).* On the other hand, the most strategic dimension is presented as the future challenge, follow future trends, to respond to the constant needs and maintain the internal customer compromised are key elements. Thus, we recognize the need for HRM reconcile the more operational dimension with a more strategic line and facing the business. As an illustration, *“too much time spent on operational tasks, but in the future, it is important to increase the relationship with the business, the*

*HR department has to have a more strategic role in the organization” (F), or “work is very operational, shifts, vacation, wages but we have begun to value the strategic dimension, we have more meetings with the directors and management, this is the future .... and I also find it more attractive” (K).*

Finally, the competitiveness in the hotel units where people are presented as a key element. On the one hand, competition from other hotels, and requirement of customers, the establishment of partnerships and the need to adopt a global perspective are the most mentioned elements. On the other, the need to meet some specifics of the tourism industry related to shifts, seasonality, investment in technological improvement as well as the weight of the strategic role of HRM. Thus, it is concluded that, in the future, only the more prepared and proactive will survive, *“given the industry characteristics is very important to follow the future trends” (D interview), “next year we will invest in improving our technology, we partner with an university so we can be more prepared . . . the market will begin to be increasingly selective and in this area there is an huge competition” (B).*

## **5 Conclusion**

### **5.1 Main Findings**

The results of this study showed that the competencies and skills required for hotels units professionals are changing as a result of the emergence of new functions for this sector in Portugal (e.g., SPA/wellness manager, e-commerce manager, revenue/yield manager, guest relations) and the importance that information technologies are assuming in boosting the sector’s economy, more competitive and innovative. HR managers in this study recognize the importance of betting on more qualified HR, with higher education and domain on foreign languages (e.g., English, French, German and Spanish), which are the requirements and skills more valued.

HRM practices that are being developed seem to be sufficient for the current management of HR. However, these managers are aware of their need to invest in another way to develop these practices. It is important to enjoy the benefits of IT for their development, reducing the time devoted to administrative management in this function. Vocational training is valued, especially by the benefits which gives the permanent development of the necessary skills and better performance of its professionals. The focus on career development plans is identified as one of the main challenges for the HR function in helping to minimize the adverse effects of seasonality that still very present in the sector. Given the constraints of the remuneration policy which characterizes the sector, HR managers are aware of the need to rely more on incentives and productivity bonuses as wage supplements to enhance the satisfaction and the consequent desire to stay in the hotel units. Finally, our results show that, according to HR managers, employees are recognized as key elements of competitiveness of the hotel unit, not only in response to increasing customer challenges but

also to ensure competitiveness to face the huge competition. Both are reasons why HR strategic management should be promoted in the future.

## 5.2 *Theoretical Implications*

This study provides empirical evidence regarding what HRM practices are currently being employed by hotel units to support behavior of co-workers and quality service in hotel units. However, our findings also show that Portuguese hotel units are not using HRM practices to a great extent as considered by Zibarras and Coan (2015). Thus, the findings appear to highlight a gap between research and practice. Furthermore, the changing role of HR practitioners from an administrative to a more strategic role could in future, most probably, explain a major growth of the importance of this field on hotel units as we found on previous literature in other countries (e.g., Bartram & Rimmer, 2011; Gillon, Braganza, Williams, & McCauley-Smith, 2014; Mamman & Kulaiby, 2014). Such as Tsaour and Lin (2004), we propose that when employee perceive their organization as one that has invest on HRM function and activities such as recruitment and selection, training and career development, compensation, performance appraisal, and so on, on the one hand they are then enabled to do the organization's main work of serving customers and on the other hand, they stay more satisfaction and increase their desire to remain. This propose underline the importance of HRM researchers give more attention for results obtained on development of HRM practices in this sector. For example, our findings are consistent with the study by Cho et al. (2006) because showed that when the hotels develop HRM practices, the hotel would experience high profit and low turnover rate of their employees. As referred to Cristiani and Peiro (2015), HR function or department increases their organizational value and status when it recognizes HRM practices as sources of competitive advantage.

Other finding in our study seems to be related the high remain of workers within this industry. This difference with studies in others countries, may be, because HRM function is influenced by Portuguese society and organizational culture.

In Portuguese hotel units prevails "paternalistic" organizational culture (Hofstede, 1991) that guarantees job security by promoting, in turn, an adversarial attitude to risk. It is possible that the adoption of this type of culture can help to understand the greater tendency of the employees of the Portuguese tourism industry to remain in their function compared to the turnover rates found in this sector in the US, where the high turnover rate is one of the most important issues in the tourism industry, Which may range from 35 to 115 % (Cho et al., 2006). On the other hand, we believe that the differences found in Portuguese hotel industry may be explain because the economic-financial situation affecting the Portuguese economy, which during the last 3 years, may also explain this need for retracting investment in HR, particularly in this sector, in which is need to rationalize all cost to guarantee the competitiveness national and international.



### ***5.3 Practical Implications***

Our data suggest that within Portuguese hotel units there is not great the concern with human resources management. This evidence can be explained due to the fact that the majority of hotels in our sample there is not a HR manager with specific qualification in human resource management. As suggested by Martins, Silva, and Costa (2014), for becoming a business partner, the HR responsible will need to make his abilities wider and transversal (Coetzer & Sitlington, 2014). The raise of these HRM competences, in order to become better people managers, and the development of excellence of those talents that compose the HR teams will allow the HRF role as a business partner to be unquestionable (Reilly & Williams, 2012). Particularly, in Portuguese context, the lack of specific qualification in HRM accentuates, until the middle of 1990, the reactive and administrative role of the HR function, coping with an under valuable status inside the company (Cunha et al., 2010)—until that decade attributed to professionals with qualifications in Psychology, Sociology and Law. With the beginning of the first degrees in HRM in Portugal, during the 1990s, the HR function seems to assist to a gradual growing of its importance in the Portuguese organisations since the beginnings of the twenty-first century (Martins et al., 2014). Furthermore, this study is expected on the one hand to be helpful to the managers of the hotel organizations in planning and executing HRM practices as well as to know the importance of HRM role on satisfaction of workers or their desire to remain within the organization. On the other hand, this study might encourage other hotel organizations to introduce similar practices.

### ***5.4 Limitations and Suggestions for Future Research***

The study has some limitations that should be considered when interpreting the findings. Those limitations, in turn, result in possibilities for further studies.

Firstly, the approach adopted—case study and in-depth interviews—precludes the generalization of the findings. Future studies should include more Portuguese hotel units.

Secondly, the human resource management role and the dimension of the hotel can help to explain some of the specificities found in these Portuguese hotels compared to other countries. For example, because in our sample there is not any multinational hotel can help to explain the importance role of HRM was found in previous studies (e.g., Bartram & Rimmer, 2011; Gillon et al., 2014; Mamman & Kulaiby, 2014) but was not replicated in the hotel units involved in this research.

Thirdly, the co-workers perspective about HRM is not been exploited, so future studies could analyse how the HRM role influences the behaviour, performance, satisfaction and consequently his/her wish to remain with or leave the hotel. Only repatriates were interviewed and no recent expatriates or expatriates about to begin the assignments.

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# Tourism Education in Greece: Development or Degradation?

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**Abstract** The importance of Greek tourism for both the economy and the society has been widely discussed in the relevant literature. It has also been acknowledged that tourism education significantly affects the quality of the services offered and as a result, influences competitiveness in the global market.

Tourism education in Greece is provided through a wide range of educational units both private and public, at higher education and post-high school levels. The development of job related skills is considered crucial, although many employees in the tourism sector have not received any formal training and do not hold any relevant degree. Instead, they remain competitive in the labor market due to their experience in the respective sector.

The purpose of this empirical study, is to investigate tourism education changes over time and understand whether tourism education in Greece is currently undergoing a development or degradation phase. Factors like economic circumstances and technological developments are also assessed in terms of their role in the quality of the tourism education services offered.

**Keywords** Tourism education • Tourism training • Tourism development • Tourism economics • Professional skills

**JEL Classification** I21, A23 • J23 • J24 • L83 • O15 • P46

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## 1 Introduction

Tourism is considered to be one of the fastest growing industries worldwide. According to recently published data by the World Tourism Organisation ([www2.unwto.org](http://www2.unwto.org), 2014), from 1950 to 2013, international tourist arrivals grew from 25 to 1087 million. Of course, global tourism had been quite vulnerable to political and socioeconomic events that shook public perception. However, what is more important is that tourism managed to recover, quickly (Greek National Tourism Organization, 2011); quite recent examples are the 9/11 incident and the harsh economic crisis effects in the international markets. As far as tourism in Greece concerned, the effects of the economic crisis were clearly felt in 2012. During that year, about a million less arrivals of non-residents were reported in Greece compared to the previous year. However, in 2013 a 2.5 million increase in arrivals seemed to level things upend reset status quo.

The importance of tourism in the European Union was highlighted by the Lisbon Treaty. As a result, sooner or later, most of the EU countries incorporated EU policies into their existing regional and national policies ([Ec.europa.eu](http://ec.europa.eu), 2015a, 2015b). The Bologna Process affected higher education in EU countries, too. Also, an attempt was made to strengthen the quality assurance system while facilitating both the qualifications' recognition process and the time periods, through the introduction of a three cycle system ([Ec.europa.eu](http://ec.europa.eu), 2015a, 2015b).

The Greek tourism product is considered a mixture consisting of several goods, services and natural elements. Most of the tourists though, do travel to Greece in order to enjoy the sun and the sea, two of the natural elements shared among most Mediterranean destinations (Tsartas et al., 2010). Among those destinations, during the last 4 consecutive years, Greece ranks fourth in terms of international tourist arrivals, surpassed by Spain, Italy and Turkey and followed by Croatia and Portugal ([www2.unwto.org](http://www2.unwto.org), 2014). In order to improve Greece's competitiveness relative to the previously mentioned countries, special attention should be given to the quality of the services offered in the tourism sector. Obviously, as long as sun lust remains the core motive for destination choosing, the service-based nature of the Greek tourism product is the one that dominates.

As a service-based industry, Greek tourism depends on the people responsible to offer the various services. More important, quality of service, in general, is highly correlated with the education and training employees have acquired and the relevant skills they possess (Guzeller, Yildiz, & Sonuc, 2009). While training depends on the business or institution one works for and skills depend on the extent to which he/she is familiar with and/or experienced in a given sector, education is a matter of public policy, personal ambition and sociocultural framework (Aspridis, 2011).

Given the fact that well-educated employees can fulfill the continuously growing in terms of both number and complexity tourism industry, public policies over the last few years concentrate in the proliferation of public institutions and programs of all kinds, offering tourism-related studies. Private sector is also present in the field,

promising sound infrastructure and better quality of the relevant studies offered (Moira & Mylonopoulos, 2008).

More specifically, introductory tourism related studies are offered by public secondary education via Vocational Lyceums (EPAL), Vocational Schools (EPAS) and Schools of Vocational Training (SEK). Depending on the duration of the studies, graduates reach level 3–5 in the European Qualifications Framework (Ec.europa.eu 2015a, 2015b). Equivalent private educational structures are also present.

Public post-secondary education includes Vocational Training Institutes (IEK). Studying in these institutes has recently become free of charge under EU funding. The difference between them and the institutions mentioned above is that the courses offered by IEKs are supposed to be “work oriented and linked to the demands of the labour market”. Graduates reach level 5 in the EQF and are awarded a diploma which afterward leads to certification under examination from EOPPEP, a certifying body. In addition to them, private IEKs have deluged the market.

Tertiary education is basically divided into University and Technological sectors. Undergraduate studies in public universities (AEI) last from 4 to 6 years, while in technological educational institutes (TEI) last from 3 to 4 years. Universities are required to offer “high-level of theoretical and all-around training for the future scientific workforce”. On the other hand, courses offered at TEIs are more practically oriented. In both cases graduates reach level 6 in the EQF. Postgraduate studies are also available, while graduates reach level 7 in the EQF.

Except universities and technological educational institutes, tertiary education includes the Hellenic Open University and other higher education non university institutions. Among them are the Higher Tourist Training Institutes. The Hellenic Open University represents the opportunity for open and distance learning in Greece, while the Higher Tourist Training Institutes provide specialized vocational training.

As expected, private universities, mostly known as colleges, do also operate in Greece and have spread their point of interest towards tourism and hospitality studies. Their number and reputation grew significantly after the decision of the Greek government to acknowledge the titles awarded by them as equal to those awarded by public universities, provided they are accredited by UK, EU or US organizations.

## 2 Literature Review

In the recent past, a large number of authors wrote articles about tourism management examining the issue of hospitality and tourism education (Christou, 1999 in Tarek, 2012).

Dolnicar (2001) in Tarek (2012) stated that, few recommendations can be found on how a nation’s education system could best possibly support the tourism industry.



A model proposed by Baum and Esichaikual (1998) in Tarek (2012) of tourism and hospitality education includes the following:

- The program should be capable of responding to industry needs at the same time as it produces graduates who can understand and manage the economic, social and cultural impacts of tourism on the residents of the host region.
- The program should balance the development of practical management skills with development of a more general understanding of various social science disciplines (Santich, 2004 in Tarek, 2012).

Atay and Haci (2010) in Tarek Sayed Abdel Azim (2012) asserted that, it is of great importance to train the students, who receive tourism education, in line with the needs of the industry.

Studies developed for the Association of Greek Tourism Enterprises (Tsartas et al., 2010) highlight the importance of tourism for the Greek economy and additionally suggest reforming of the tourism education and training provided by every institution in the Greek territory as a viable method to boost the country's competitiveness in the sector. Moreover, what is highlighted in literature is the distinction between tourism education and tourism training (Research Institute for Tourism, 2004). The second is considered more job-related, while the first reflects a more theoretical background.

Furthermore, it is stated that emphasis should be given to the modernization of the content of tourism studies along with the adoption of new technologies (Sigala, 2013).

At the same direction had also pointed Sigala (2002). She suggested that new technologies and especially e-learning methods are the ones needed to be introduced in tourism studies, so that time and costs to be minimized and an ever-changing sector to be revolutionized.

However, graduates' opinions are not to be neglected. Moira's report (2004) discusses the paradox that even though more than half the graduates interviewed agreed that the knowledge and skills gained were sufficient, only one fifth of them reported that their degree proved helpful in finding relevant employment. On the contrary, they referred to knowledge of foreign languages, family network and computer literacy as more helpful ones. Knowledge of foreign languages is generally highlighted as an important skill to possess when working in any industry (Archan & Dornmayr, 2006).

Comparative studies with other Mediterranean countries, such as Turkey, which rank higher than Greece in terms of international tourist arrivals as stated above, suggest the standardization for tourism education (Guzeller et al., 2009). Against raw standardization argues Munar (2007) and at the same time suggests globalization.

As far as tourism education in Greece concerns, previous studies have focused on the importance of the interconnection between the educational process and the needs of the tourism sector. Two main courses of action have been suggested in order for an upgrade in tourism education to happen: the establishment of common taught material along with the formation of certification systems that add value and

credibility to different kinds of tourism-related diplomas (Research Institute for Tourism, 2004).

### 3 Methodology

Considering the aim of the study which is to conclude in whether tourism education in Greece is currently undergoing a development or degradation phase, a thorough knowledge over the subject should be gained. The focus of the study concentrated mostly in postsecondary and tertiary education. Therefore, data were extracted from the existing bibliography describing the situation a few years ago.

Later, and since the data from the bibliography were limited, an attempt to collect information for both past and present situation of several tourism-related educational units took place. Institutions' websites were considered the most suitable source for that kind of information. However, a systematic search was not easy to be made, since most public institutions' websites were not updated, due to lack of economic resources. Despite the difficulties, a comparison was attempted. At that point it is important to mention that public and private institutions were presented in contrast with one another.

Results, mostly describing the current situation were presented in tables, in order to be easier for conclusions to be made. Regarding the change, several events that affected the course of tourism education in Greece are outlined. At last, they were analyzed based on the literature review previously made.

### 4 Results

Higher education tourism programs, which are characterised "by a focus on specific occupational skills" (Inui, Wheeler, & Lankford, 2006), first appeared in the 1960s in Europe and rapidly developed to other parts of the world (Gonçalves, 2014).

Tourism studies in public tertiary education are only offered through technological educational institutes (TEI) in Greece. Until now, there is no university offering tourism-related studies of undergraduate level or has ever been. More specific, ten TEI all over Greece are licensed to award their graduates diplomas of Tourism Management. They are located in Athens, Igoumenitsa, Heraklio, Thessaloniki, Amfissa, Larisa, Patra, Piraeus, Lefkada and Grevena.

The Department of Tourism and Hospitality Management consists a part of the Business School of TEI of Athens. It was founded in 1983 and was actually the first institution offering undergraduate tourism studies in Greece (Teiath.gr, 2015). As its name suggests the core study object is business administration with an emphasis in tourism enterprises' management. The initial curriculum of the Department changed twice during the academic years 1999–2000 and 2009–2010. The next academic year was again modified. The result of those changes and modifications,

which targeted both the material and the semester of the subject taught, was the channeling of the market with graduates of different generations. However, the common denominator of all curricula applied was the mandatory nature of the internship.

The Department of Tourism Management located in Igoumenitsa is a part of TEI of Epirus. It was founded in 1994 and its orientation is basically the same with the one of the corresponding Department in Athens. The reform concerning its curricula was concentrated in the abolition of subjects with a more technical nature like the ones taught in Vocational Training Institutes (IEKs). Internship is in this case also considered mandatory (Tour.ioa.teiep.gr, 2015).

Tourism Management studies are offered by TEI of Crete as a direction of the consolidated Department of Business Administration, which is located in Heraklio. The consolidation of the previously separated Departments of Business Administration and Tourism Management took place in 2013. The above move orchestrated by the Ministry of Education was a consequence of the economic issues the country was facing and an attempt to ensure the sustainability of as much educational units possible. The graduates of the consolidated Department of Business Administration are awarded two different kinds of diploma, based on the curricula they chose to participate in (Tour.teipat.gr, 2015).

The Department of Tourism Management that consists a part of the Business School of TEI of Thessaloniki was founded in 1983. By 1995 is the only educational unit in Northern Greece that provides undergraduate tourism-related studies. The subjects of the curricula are divided in three categories: general—introductory, specific—tourism-related, specialty subjects. Of course, in the case examined, internship is a vital point of the curriculum (Teilar.gr, 2015).

The Department of Management Economy and Communication of Cultural and Touristic Units, is located in Amfissa and is part of TEI of Lamia since 1998. Management of Cultural Units and Hospitality Enterprises is one of the three directions offered, most relevant with the curricula examined so far. However, it is important to note the difference in orientation, since the cultural aspect of tourism is strongly highlighted. As a result, graduates are most likely to be employed in culture-related, both public and private, units (Amf.teilam.gr, 2015).

Since 2013, the Department of Tourism Management located in Larisa has been consolidated and actually consists a direction of the Department of Business Administration of TEI of Thessaly (former TEI of Larissa). It is important to mention, that out of the four existing directions, only the tourism-related one starts from the first semester of studies. In contrast with the case examined in TEI of Crete, students do not receive general Business Administration knowledge. Instead, they are introduced at the same time into tourism and business administration through a range of subjects, different than the corresponding subjects taught to all other directions' students (Amf.teilam.gr, 2015, Teilar.gr, 2015). More specifically, a series of studies have revealed the impact of faculty and administration staff culture, leadership and service quality provided to undergraduate students in the School of Business and finance (including the Department of Tourism

management) at TEI of Larissa, which has recently renamed into TEI of Thessaly (Trivellas et al., 2012; Trivellas & Dargenidou, 2009a, 2009b; Trivellas & Santouridis, 2014).

In Patra is located the Department of Tourism Management of TEI of Western Greece. It was founded in 1983 and for 20 years the only change made was the transform of the 3 year study model into a 4 year one with the last semester dedicated to internship. Since the academic year 2002–2003 the Department produces graduates based on the reformed curriculum applied. The orientation of the studies though did not change. One year later, new educational methods were embedded highlighting the importance of innovative technologies such as the internet and e-learning (Tour.teipat.gr, 2015).

The Department of Business Administration of TEI of Piraeus is the result of the consolidation of the Department of Tourism Management located in the island of Spetses and the Department of Business Administration located in Piraeus. The case mentioned is quite unique, since the curricula of the two directions share some subjects taught while others are completely different (Mngdep.teipir.gr, 2015).

Another case of consolidation is the one examined in TEI of Ionian Islands. The Department of Tourism Management consists since 2013, a direction of the study program offered from the Department of Business Administration. Both directions share the same introductory subjects, but as expected, the two curricula are even differentiated as moving up to higher semesters. In order to acquire the diploma, internship is a must (Ba.teiion.gr, 2015).

Last case of a consolidated Department offering tourism-related studies, is the one located in Grevena as a part of TEI of Western Macedonia. The Department of Business Administration offers the opportunity to its student to choose between two directions. One of those directions is Tourism and Hospitality Management. The relatively new infrastructure along with the statement that “the curriculum of the Department was designed based on the best Greek and International curricula” seem quite promising (Ba-g.teiwm.gr, 2015).

As far as public tertiary education of postgraduate level concerns, the choices are very limited. One of them is given by TEI of Central Macedonia, the other one by the University of the Aegean and the last ones by the Hellenic Open University and the University of Piraeus.

The M.B.A. in Hospitality and Tourism is offered from TEI of Central Macedonia located in Serres since 2012. It is the newest one and all courses are taught in English. The study period lasts normally three semesters. The first year is dedicated in taking classes. The remaining time is given in order for students to complete their thesis. While preparing their thesis, students are given the opportunity of an internship in a five star hotel or a tourism organization. Of course, there is tuition in order to participate (Mbatourism.teicm.gr, 2015).

The University of the Aegean offers since 1998 a postgraduate level program by the title “M.Sc. in Tourism Planning, Management and Policy”. In 2000, the program underwent a crucial reform. More specific, the semesters of study were reduced from four to three. The first two semesters, students take classes in the facilities of the University in Chios, while in the last one they complete their thesis.

It is important to mention though that they are not given the opportunity of an internship. In this case too, tuition needs to be paid (Tourism-pms.aegean.gr, 2015).

Since 2000, the Hellenic Open University allows mostly already employed graduates to deepen their knowledge in tourism management through the corresponding postgraduate studies program “M.Sc. in Tourism Management”. The minimum study duration is three academic years. During those, students need to complete their thesis after successfully taking three thematic sections. As expected, there is no internship opportunity through distance learning. In addition, there is tuition as in every program offered by the Hellenic Open University (Eap.gr, 2015).

Finally, the more recent insertion in tourism education is the M.B.A. Tourism Management (Hospitality, Travel and Leisure Industries) offered by the University of Piraeus. The minimum study duration is three academic semesters. During those, students need to complete their thesis after successfully examined in all academic modules. As expected, there is no internship opportunity through distance learning. In addition, there is tuition as in every program offered by the University of Piraeus (Unipi.gr, 2015).

Through research, another similarly limited number of postgraduate tourism-related programs came to surface. However, they are not to be mentioned since they were not approved to continue their educational operations during the present academic year.

Judging by the above presented data, public tertiary tourism-related education is diagnosed to experience several weaknesses. The gaps left, as expected, were filled by private tertiary education providers. Since 2008, several colleges all over Greece were acknowledged by the Greek government and were allowed to deliver degree-reaching (bachelor and/or master) educational services (Ministry of Culture and Education and Religion, 2015).

Out of the 29 colleges examined, only 8 offer at least one program that leads to a degree in tourism-related studies. As presented in Table 1, three of those provide only undergraduate studies, just one provides only graduate studies, while the remaining four offer both. Two of the last category noted, additionally offer educational programs that last 1 or 2 years and lead in achieving a diploma or certificate instead of a degree.

Other crucial parts of tourism-related tertiary education are the Higher Tourist Training Institutes. There are two Higher Tourist Training Institutes that are located in two of the largest islands and most popular destinations of Greece, Crete and Rhodes. The one located in Rhodes, founded in 1956, was the first specialized School offering tourism and hospitality related studies in Greece, based on the standards set by the corresponding School in Lausanne (Aster.edu.gr, 2015).

The operations of both Higher Tourist Training Institutes are under the supervision of the Ministry of Tourism. However, the entrance of potential students in the School is controlled by the Ministry of Education. In order for the interaction to be smooth, both authorities need to cooperate one with the other.

Studying in Higher Tourist Training Institutes is quite differentiated than all other cases presented above. More specific, the study period lasts seven semesters.

**Table 1** Degrees offered per college

College	Degree offered
Metropolitan college	B.A. (Hons.) Hospitality and International Tourism Management
ALBA	M.Sc. in Tourism Management
New York college	B.Sc. in Business Administration emphasis in Tourism and Hospitality Management
	B.A. (Hons.) in Business Studies with Tourism
	B.Sc. (Hons.) International Hospitality Management
	Master in Economics and Management of International Tourism
Deree college	B.A. in International Tourism and Hospitality Management
City unity college	B.A. (Hons.) International Food & Beverage Management
	B.A. (Hons.) International Hospitality & Tourism Management
	B.A. (Hons.) International Travel & Tourism Management
	B.A. (Hons.) Events Management
	M.Sc. Tourism Management
	M.Sc. in Hospitality Management
	<i>H.N.D. in Hotel Management</i>
BCA college	B.A. Hotel and Tourism Management
	<i>Hospitality Operations Certificate</i>
	<i>Hospitality Management Diploma</i>
	<i>Food and Beverage Management Diploma</i>
	M.A. Hospitality and Tourism Management
ICBS Business school	B.A. in Tourism and Management
IST college	B.A. (Honours) Tourism, Hospitality and Leisure Management
	B.A. (Honours) Tourism Management
	M.Sc. International Tourism and Hospitality Management

Each academic year is separated in two courses of studies: the theoretical, from October to June, and the practical one, from July to September. The last semester is dedicated in the completion of the students' thesis and internship. It is important to note that this kind of Schools produce graduates ready to cope with every given application of the tourism sector (Otek.edu.gr, 2015).

An excessive part of students who are willing to continue their education in a post-secondary level is absorbed by Vocational Training Institutes (IEK). There are two kinds of IEKs though, the ones supervised by the Ministry of Tourism and others supervised by the Ministry of Education. While the first ones offer only technical tourism-related studies, the second ones offer the opportunity to students to engage themselves with a variety of specialties and as a result, graduates serve a vast amount of sectors. In both types of institutions the study is provided for free. The studies last five semesters. The last one is dedicated in internship.

IEKs, which are supervised by the Ministry of Tourism, produce graduates with three different specialties: Tourism units' and Hospitality enterprises' technicians, cooking art technicians—chefs and bakery and pastry making technicians. Those

**Table 2** Positions offered per IEK per specialty and time of day classes taught (2014–2015 data)

IEK	Tourism units' and Hospitality enterprises' technicians	Cooking art technicians—Chefs	Bakery and Pastry making technicians	Total number of students	Time of the day classes are taught
Anavissos	75	50	25	150	Morning
Heraklio	50	50	25	125	Afternoon
Peraia	25	25	0	50	Morning
Rhodes	50	50	25	125	Afternoon
Argos	25	25	0	50	Morning
Galaxidi	25	25	0	50	Morning
Alexandroupoli	25	25	0	50	Morning
Corfu	0	25	0	25	Morning

IEKs are located in eight different sites: Anavissos (Attica), Heraklio (Crete), Peraia (Central Macedonia), Rhodes (Aegean Islands), Argos (Peloponnese), Galaxidi (Central Greece), Alexandroupoli (Eastern Macedonia and Thrace) and Corfu (Ionian Islands). The distribution of specialties and number of students accepted differs per site. The time that classes takes place differs too. Both facts are presented in Table 2.

As it is clearly presented in Table 2, most available positions for students eager to follow tourism related studies are offered at IEK located in Anavissos, which actually serves residents of Athens, the capital of Greece, and at those located in the most popular tourist destinations, Heraklio and Rhodes. Most IEKs operate morning hours, not allowing students to work and study at the same time. Through a comparison of the positions offered per specialty for the last academic year, it is obvious that significantly less are provided to those that aim to become Bakery and Pastry making technicians.

At that point it is important to mention that during afternoon hours, most of those IEKs operate as training centers for tourism professionals who want to deepen their knowledge in the area and at the same time are employed in tourism enterprises. Moreover, until the previous academic year, Guides School used to operate under the same roof. However, they were recently replaced by accelerated programs offered by University Departments of relevant cultural orientation (Otek.edu.gr, 2015).

IEKs, that are supervised by the Ministry of Education, give students the opportunity to study the specialties mentioned before. However, there, are additionally offered four other specialties: Agrotourism technician, Administration and Economy executive in the Tourism sector, Thalassotherapy and Spa therapy employee and Flight commissary. It is quite important to note though, that not all of those are offered in every IEK of the country for every academic year. On the contrary, whether a specialty's classes will be taught, depends on the demand. A certain number of potential students need to show interest in order for the classes finally to be offered.

**Table 3** Number of IEKs supervised by the Ministry of Education per region

Region	Number of IEKs
Eastern Macedonia and Thrace	6
Attica	28
North Aegean	4
Western Greece	9
Western Macedonia	6
Epirus	4
Central Greece	6
Thessaly	5
Ionian Islands	4
Central Macedonia	23
Crete	7
South Aegean	7
Peloponnese	10
Total	119

As Table 3 shows, IEKs supervised by the Ministry of Education are widespread through all Greece's regions. By far, most of them are located in Attica and Central Macedonia, since there are found more students to be taught. Also, out of the 119 IEKs existing, 10 were founded in 2014.

Despite the satisfactory number of public IEKs all over Greece, there are also private ones that offer tourism-related studies of similar specialties. Of course, studying at a private institution is not free of charge as at a public one. However, better infrastructure and supportive educational services, like interconnection with the labor market, are two important motives for students and their families to choose private IEKs. In addition, educational personnel of private IEKs is permanent and such a work relationship ensures quality. On the other hand, most trainers employed in public ones are paid by the hour and are not evaluated for the services they provide.

## 5 Conclusion

As far as the general structure of tourism education concerns, the most revolutionary change made over the last few years is the penetration of tourism in tertiary education. It was all about introducing the idea of tourism education instead of training and producing high level executives rather than low level employees. Of course, the variety of passages through which someone in Greece can gain tourism-related education counts as a plus. Same is the case regarding the widespread network of institutions that offer those studies that allows participation even if tourism is not the flagship activity of the region in question.

Curriculum is a hot subject when referring to education. In tertiary education, mostly of undergraduate level, lots of attempts have been made over the years



aiming the reform of curriculum in order to be kept updated based on European and international standards. However, that was not a generalized fact, but rather individual cases of ambitious administrations.

The consolidation of TEI Departments offering Tourism Management and Business Administration studies, in most cases examined cannot be considered as a step forward in tourism education. The smothering of the clearly tourism-related nature is just a sacrifice that government officials thought to be mandatory in order for sustainability to be maintained in such difficult times, during the economic crisis.

The stagnation related to the postgraduate level of public tourism studies is clearly not an encouraging fact. That level of study is strongly connected with the development of research over tourism. Since, postgraduate tourism education remains limited no exceptional research development is expected. However, considering that the gap has already been filled by private institutions, there is hope that research over the field will continue to grow.

Due to the long lasting course of educational units supervised by the Ministry of Tourism, a query raises over the reason why Ministry of Education is involved in that extent in tourism related educational services. Acknowledging the fact that as many the authorities that need to agree in any given issue such much the time and effort needed a reduction of the role of Ministry of Education might be considered useful.

Other issues that need to be pointed are the interconnection between educational units and tourism labor market and the unified certification of tourism professionals. Internships should become the most vital part of any curricula in tourism education and is advised to last longer. New technologies can be embedded that provide remote support to the student-intern, so that the effectiveness of the procedure to be maximized. On the other hand, a better certification mechanism might end up in reaching the initial purpose of the improvement of tourism education, which is ensuring better quality of the service offered.

The general analysis suggests that the present level of tourism education in Greece is considered satisfactory. However, there is a perceived need for more practice-oriented elements in the curriculum and it is suggested that tourism education departments should restructure their curricula with a view to introducing more practical work, more educational visits to firms and industrial placements of longer duration. The tourism education system in general also needs to be better articulated, preferably with just one overseeing authority. For example, a number of critical factors has been suggested for the provision of higher academic and service quality to undergraduate studies delivered by Tertiary Education, such as quality assurance systems, academic leadership and culture, introduction of new educational technologies (Metalidou et al., 2014; Trivellas et al., 2012; Trivellas & Dargenidou, 2009a, 2009b; Trivellas & Santouridis, 2014). Finally, collaboration between educational institutions and tourism-related bodies, both state-owned and private-sector, is to be encouraged as it will bring benefits to curriculum content and the matching of tourism qualifications with current industry needs (Diplari and Dimou, 2010).

Judging by the above presented data, tourism education is currently undergoing a phase of restricted development. The case is such due to the economy of the country, which cannot fully support already existing or brand new structures to benefit and upgrade tourism education in Greece. However, the crisis is not only economic. It also contains a social aspect. So, special attention should be given in not letting tourism education fall into a degradation phase by cultivating mostly soft skills of potential tourism industry employees in order to be able to handle situation as good as it gets, even without the best supplies.

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# The Influence of the T.E.I. of Thessaly in the Sustainable Development of the Region of Thessaly

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**Abstract** This work aspires to study the role of the Higher and Highest Educational Institutions in the sustainable development of a Region. More particularly, is studied the impact of the T.E.I. of Thessaly (*based in Larissa and the annexes are in Trikala and Karditsa*) in economic, social, cultural and educational life of the Region. The article is divided into three parts. In the first part it is studied the T.E.I. of Thessaly (*in the frame of country's higher education*) and the region of Thessaly. In the second part it is presented the basic conceptual delimitations and finally in the third part the research conducted in order to highlight the establishment and operation impacts of T.E.I. Departments in the broader Region. The conclusions of this study will contribute to the dialogue developed and will provide knowledge for the peculiarities of the Thessaly Region.

**Keywords** Sustainable development • Smart city • Economic development • Third higher education • Regional authorities

**JEL Classification** A20 • O18 • O43

## 1 Introduction

The Constitution, article 101, par. 1, highlights the importance of Regions when it provides that “*the State's administration is organised according to the decentralizing system*”. In the article 102, par. 5, sp. A’, it is provided that “*the State receives the legislative, regulatory and budgetary measures required to*

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*ensure the financial autonomy and resources needed to fulfil the mission and the exercising of powers of local authorities, while ensuring transparency when managing these resources”.*

The Programme for International Students Assessment PISA, of OECD, is an international survey, aiming at the follow-up of the effectiveness of educational programs, according student achievements (on the website <http://www.iep.edu.gr/pisa/>). In an article in the Daily, **P. Mandravelis** (October 2014) presents his book **Ph. Aghion** and Roulet (2012) in which the writers consider that the economy advancement requires, among others, greater investments in the highest education. At the same time they present a diagram from which it results that the countries distinguished by the student competition have better growth rates as well (Aghion & Roulet, 2012).

In recent years there has been developed an important dialogue about the affecting way of Higher and University Educational Institutions to the local economy, prosperity and development and in relation to the Lisbon Strategy (*Lisbon Strategy*). In the USA and in Gr. Britain there were created the conditions for development of higher education institutions in order to develop their cooperation frame, as well, with the local communities and the development of human resources (Gomez-Mejia, Balkin, & Cardy, 2012) and entrepreneurship (Local Government Association, 2013; Komninou, 1986). A characteristic example is the University of Cambridge which highlighted the positive relationship between the expenses for the research and these disseminations in the local community to promote the economic development (Genitsaropoulos, Botsaris, & Ladias, 2011).

A lot of areas in Greece supported their economy in the strategy of establishment of higher education Departments and specifically from the 1980s decade 1980 onwards (Diamantopoulou, 2006). Until then, the Institutions were limited to large urban centres such as Athens, Thessaloniki, Patra, Heraklion. Besides, until the beginning of economic crisis, in 2009, this policy was reminiscent, the paraphrased, motto of Colonels Dictatorship “*each city and stage, each village and gym*”, i.e., the establishment of A.E.I. and T.E.I. departments in every city and small town, respectively, as mentioned characteristically by Professor **Bourantas** in an article of his own (2012). The purpose of this policy, according to **Bourantas**, was both the empowering of the local communities and the effective education, but many times it is irrational, because it did not take into consideration the needs of the local community. This policy was intended to create scale economies and to improve the current situation. After the signing of the memoranda, the lenders required reduction, merger or even the closure of the Departments and the Institutions across the country.

The objective of the study is to highlight the economic and the social implications of the establishment and the operation of Higher Education Institutions in a Region, especially in matters relating to development, employment and the knowledge economy. As a case study we have the T.E.I. of Thessaly, based in Larissa and the Departments in Trikala and Karditsa. The proposal is based on the study of written evidences, on the use of the historical method and on the research process. The incentives for employment in this particular issue were both scientific and the personal interest.

In the first part of this proposal we were refer to the higher education in Greece and especially in the T.E.I. of Thessaly and the measuring of its developmental

progress in the wider Region. In the second part we point out the conceptual delimitations. Subsequently there are presented previous studies, the research methodology, its results and the conclusions. The proposal is completed with the presentation of bibliography and annexes.

## 2 The Higher Education and the T.E.I. of Thessaly

The art and the science, the research and the teaching are free, the development and their promotion shall be a State's obligation.

Constitution of Greece. article 16, par. 1, sb. A'

Article 16 of the Greek Constitution stipulates that the "*education constitutes a fundamental mission of State*" (article 16, par. 2). The Constitution stipulates that the bodies of the Higher Education are PE, fully self, which are under the monitoring of the state and they are financed by it (par. 5). Issues concerning the Professors of A.E.I. and A.T.E.I. are regulated in par. 6. Higher education is defined to be exclusively public. The most recent law that regulates higher education issues is the L. 4009/2011.

In our country the Higher Education is divided in the Highest University Education, which is provided by the Universities and the Polytechnics (A.E.I.), and in the Highest Technological Education, which is provided in Technological Education Institutes (T.E.I.). Moreover, there has been institutionalized the Greek Open University (E.A.P.) and the International University of Greece. The attendance at the A.E.I.s lasts 4 years, apart from certain schools where attendance can last 5 (*in the Polytechnics Schools*) or 6 years (*as in the medical schools*). In Greece there are 22 A.E.I.s (*including the E.A.P. and the International University of Greece*) (Papatheodorou, 2011).

Highest Technological Education's role is to contribute to the development of technology and to the applied science and research in our country. The education is oriented to the absorption and the transfer of scientific data in their application. A.S. PAI.T.E. belongs to the Highest Technological Education as well. The attendance at the T.E.I. lasts 4 years. In Greece there are 14 T.E.I. (Papatheodorou, 2011).

Finally, the National Qualifications Framework states that A.E.I. and T.E.I. degrees and equivalent or corresponding foreign degrees are incorporated in the 6 of the 8 levels (on the web site <http://www.minedu.gov.gr/2012-07-19-10-59-39/298-uncategorised/299-to-ekpaideytiko-systima.html>).

The T.E.I. of Thessaly was founded in 1983 by L. 1404/1983, as T.E.I. of Larissa, after the abolition of K.A.T.E.E. By the GG issue 123/3-6-2013 it renamed to T.E.I. of Thessaly. T.E.I.'s mission, among others is, address the social, cultural, educative and developmental needs of the local community with adherence to the principles of sustainable development and social cohesion and to shape, as well, the necessary conditions for the search and distribution of new knowledge and the promotion of new researchers, seeking partnerships with institutions in the country

or abroad, and participating in the exploitation of knowledge and human resources for the prosperity of the local and the wider society.<sup>1</sup>

T.E.I. of Thessaly is constituted by four [4] Schools (*Business and Economics, Technological Applications, Agriculture Technology and Technology of Foods and Nutrition, Professions of Health—Welfare*). 14 departments belong to the Schools. A total of members 153 members RS are currently serving, 114 administrators (73 of which are permanent and 41 under an employment contract P.L.I.D.), 27 GTS members and 4 S.L.T.S. members. In addition, each year in T.E.I. is recruited a sufficient number of Academic Scholars, Scientific and Laboratorial Collaborators covering emergencies.<sup>2</sup>

According to the Institution's account, as approved by the Council of T.E.I., on 16th of July 2014<sup>3</sup> (*as published in Diavgeia*) the T.E.I. had a total of 11,486,569.70 Euros in expenses (8,320,929,11 Euros of which were related to ordinary budget expenditures and 3,165,640.59 Euros were related to public investments budget expenses). These expenses are related to supplies of books and consumables, purchases, repairs, development of studies, construction of buildings and modernisation of student accommodation blocks, movements of staff payments, advertising costs, buildings and facilities maintenance, fees of temporary staff and others. Most of these expenses were related to the local community and the money remained in the Region of Thessaly.<sup>4</sup> In the T.E.I. there is a total of 20,017 students 9685 of which (5128 men and 4557 women) are considered active<sup>5</sup> and 10,332 students (6525 men and 3807 women) they are beyond the regular duration of their educational attendance.<sup>6</sup>

### 3 The Region of Thessaly

The Region of Thessaly is a geographical region of Greece. It was annexed to the independent Greek state in 1881 and it currently includes the Regional Units of Larissa, Trikala, Karditsa, Magnesia and Northern Sporades (*Annex 1*).

<sup>1</sup> The information is from the website of the T.E.I. of Thessaly [www.teilar.gr](http://www.teilar.gr).

<sup>2</sup> At this point we wish to thank Mrs E. Nasioula—Pitaraki, Head of Personnel Management, for the provision of data.

<sup>3</sup> Practical No 25 (*the 5th issue*).

<sup>4</sup> For the contribution of Postgraduate Programs of Study read Fitsilis (2012).

<sup>5</sup> According to the L. 4009/2011 (article 2) "*Active students*" : *the students of Universities and T.E.I., registered in accordance with the article 33 and the students that the duration of studies has not exceeded the duration of semesters required to obtain the diploma according to the indicative curriculum, increased by four semesters. For the part-time students this time is twice the indicative for the watching curriculum. As active students of the second cycle of study, are comprehended the students of which the duration of study has not exceeded the duration of indicative curriculum, while as active students of the third cycle of study are comprehended the students covering the first four years to the corresponding program*".

<sup>6</sup> We thank Ms Niki Ioannidou, Information service of T.E.I. of Thessaly, for providing data.



The total extent of the Region of Thessaly is 14,036 km<sup>2</sup> (11 % of the total extent of the Greek territory) and there is a population of 744,037 inhabitants. The ground is 50 % mountainous—hilly and 50 % flat and in its boundaries are included the plain of Thessaly, the largest plain and granary of Greece, which river Peneus flows through. Olympus, the southern part of the Pindos sierra, the northern part of Agrafa are included in the Region. The artificial lake of Tavropos is a project of particular importance as well. Administrative capital of Thessaly is Larissa. The economy of the broader Region is mainly rural, even though there are major industries embedded in IN.AR. of Larissa and Volos.

The Regional Unit of Larissa covers an area of 5381 m<sup>2</sup> and there is a population of 284,420 inhabitants. The Regional Unit of Magnesia and Sporades (*formerly Prefecture of Magnesia*) covers an area of 2636 m<sup>2</sup> and there is a population of 208,500 inhabitants (12,004 of which are in Sporades). The Regional Unit of Trikala covers an area of 3376 m<sup>2</sup> and there is a population of 138,047 inhabitants. Finally, the Regional Unit of Karditsa covers an area of 2576 m<sup>2</sup> and there is a population of 113,070 inhabitants.<sup>7</sup>

In the Region of Thessaly there have been established and operate two Higher Education Institutions. The University of Thessaly based in Volos and with annexes in the capitals of the Regional Units and in the T.E.I. of Thessaly, as we have mentioned. Furthermore, the Vocational Training Centre of the University of Thessaly, the Institute of Development of Thessaly, the Institute of Lifelong Learning of the T.E.I. of Thessaly and the VTC of the Regional Unit of Larissa are operating. Finally, many private VTC in all capitals of the Regional Units, are operating.

## 4 Literature Review

Were all instructors to realize that the quality of the mental process, not the production of correct answers, is the measure of educative growth, something hardly less than a revolution in teaching would be worked.

John Dewey, *Democracy and Education* (1916)

The term of economic development in the economic science refers to the long-term trend of increasing the effective *production of* products and services in an economy over time and not in the short-term fluctuation of the produced product. According to the online dictionary of economic terms, the economic development (*economic growth or economic development*) is the ability of a society to meet the financial needs of all members, argumentatively each year (on the website <http://www.euretirio.com/2010/06/oikonomiki-anaptyxi.html#ixzz3HBNUpebB>; Belias, Koustelios, Koutiva, Golia, & Zournatzi 2014).

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<sup>7</sup> According to data of the HSA for the last general census conducted in 2011, on the website <http://www.statistics.gr/portal/page/portal/ESYE/PAGE-census2011>.

According to **Pournarakis and Hatzikonstantinou (2011)**: 663) economic development is “*a process which leads to a continuous increase of the living standards, accompanied by a gradual improvement and maturation of economic, political and social erosions of an underdeveloped or developing economy*”. Some of the characteristics are related to the employment in the three sectors, the level of education, the exploitation of natural resources and others. **Chletsos (2008)**: 4) considers that competitiveness refers to the ability of “*maintaining and improving the living standards of the country’s citizens—increasing the employment and real income, reduction of unemployment, as well as the strengthen of capacities and opportunities—within and across national borders, under globalisation conditions*”.

Economists have determined the local economic development, as well, which concerns a wide range of factors that support and enhance the economic enlargement and the development of the local economies and concerning actions in the internal environment of a region (Metaxas, 2012). The regional competitiveness in accordance with the definition of the European Commission (1999) (cited by Chletsos, 2008: 5) is “*the ability of producing goods and services that satisfy the demand of international markets, while maintaining high and sustainable levels of income, or more generally, the ability (of regions) to create, while are exposed to the international competition, comparatively high incomes and jobs*”.

Viable and sustainable development (*sustainable development*)<sup>8</sup> refers to the economic development of the region and is materialised in accordance with the principles of the environmental protection. Sustainable development requires the development of the productive structures of the region’s economy, while, in general, the sustainability’s goal is the maximum gain of goods from the environment. This is a development which is in line with the needs of the present generation, but it does not endanger the future, as well. One of the most indicative definitions has been given by the World Bank. “*Sustainable development means that the developmental and environmental policies should rely on a cost analysis—benefit analysis and on a careful economic analysis that will strengthen the environmental protection and it will lead to increasing and sustainable levels of prosperity*” (World Bank, 1992). It was defined for the first time in 1987 in the **Brundtland** report as “*the development that satisfies the needs of the present without compromising the ability of future generations to meet their own needs*”.

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<sup>8</sup> **D. Rokos**, emeritus Professor of the NTU, (2013) gives a different approach to the concept. In particular, he uses the term **worth living integrated development** and defines, that it is “*simultaneously and diachronically, at a global, supranational, national, regional and local level, economic, social, political, cultural and technical/technological “development”, which can exist, only when committed in dialectic harmony and with respect always to the human’s age-old noble values and his “whole” natural and cultural environment, in which he peacefully and creatively comes within as an integral rather than sovereign part of his own. The integrated development as a road and goal, is for this peaceful and worth living, for all citizens, wherever they live, regardless of race, gender and religion and not only for those who have and possess*”.

And all of this in the context of satisfaction, via the economic system, the individual and social needs.<sup>9</sup>

The Lisbon Strategy (2000) dealt among others with a series of reforms based on the knowledge economy within the EU. Structural reforms were concerning the passage into a competitive and dynamic digital economy based on knowledge. To the investment into human through the knowledge economy, with the acquisition of a series of skills to increase the employment rate and others (on the website [http://www.consilium.europa.eu/uedocs/cms\\_data/docs/pressdata/en/ec/00100-r1.en0.htm](http://www.consilium.europa.eu/uedocs/cms_data/docs/pressdata/en/ec/00100-r1.en0.htm)).<sup>10</sup>

The knowledge economy term emerged in the late 1990s. Main characteristics of the knowledge economy are their rapid diffusion, it constitutes an economy of networking, it achieves high reciprocity and it is changeable. Large cities and Regions attract new talents, create the suitable environment for exchange of knowledge and to achieve an intimate relationship between economic performance and effectiveness (Kavallas, 2006; Rossidis, 2014; Saitakis, 2009).

The Knowledge Economy is based, according to **Konsolas**, Papadaskalopoulos, and Christofakis (2010), on the triptych of economy (*with the local business operators*), knowledge (*because of the productive processes and the dissemination of knowledge*) and geography of Region. Namely, the Higher Education Institutions interact with the local administration and the entrepreneurship of the Region (Etzkowitz, 2003; Etzkowitz & Leydesdorff, 2001).

According to **Mochianakis** (2014: 12) *“today the society and the knowledge economy, demonstrate a new type of identity of places. The smart. The places, that successfully adopt the vision of smart, usually have powerful economic and social background, universities, inquiring centres and broadband infrastructures. They create, in this way, an effective ecosystem of knowledge and innovation, with an impact in all the sectors of life of their citizens”*.

Smart cities constitutes a tool to all services and the applications based on the Information and Communication Technologies (ICT) for the local communities. Smart city is the city that uses new technologies in order to achieve its strategic and tactical objectives (Anthopoulos & Fitsilis, 2014; Mochianakis, 2014). Its aim is to help the citizens and to improve their lives and it is directly related to the electronic Government (*e-government*). We can define smart city as the city that uses new technologies in order to meet both strategic and its regular targets. Among other fields of digital interventions, are the education (*for example the school network*), the employment, the communications sector and others. There are presented several fields of activity of the “*smart city*” such as the industry, the participation, the technical infrastructure and the education (Mochianakis, 2014).

The characteristic fact is that education, digital activities, school network, students per inhabitant, the satisfaction for accessing the education system and the satisfaction by the quality of the education system, constitute the basic

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<sup>9</sup> See the article 24 of the Constitution, as well.

<sup>10</sup> For the regional policies of the EU see also Babalioutas and Mitsopoulos 2014.

sub-criteria of the smart city evaluation (Giffinger, 2007) (*Annex 2*). From Greece, in the category of smart cities, are both Larissa (Gerogiannis, 2014) and Trikala and the two cities of the Region of Thessaly (Anthopoulos & Fitsilis, 2014; Giffinger, 2007; Giffinger, Fertner, Kramar, & Meijers, 2007).<sup>11</sup>

According to **Manel Sanromà**, director of information systems of Barcelona, “*The cities have a common anatomy, they are based on an environment which was pre-existed their creation and it will be there for many thousands of generations . . . Every city has different reports and any such report proposes a solution, as well. However, there is not a common platform for all the cities*” (as indicated to Hekimoglou, 2013).

## 5 Previous Research

Past research demonstrates an intense correlation between the foundation and operation of T.E.I. in a Region and its financial and development as well (*Annex 3*).

**Katsogianni**, Tsitsis, Priniotakis, and Tseles (2014), have studied the relationship that develops between a Higher Education Institution and the industry. They have presented the best practices from the EU countries and showed the relationship that develops between the T.E.I. of Piraeus (*Dpt. of Textile Industry*) and the local enterprise. The results demonstrate that such partnerships contribute to the development of both the T.E.I. and the provision of profits to the businesses.

In their tasks, **Genitsaropoulos** et al. (2011) και Genitsaropoulos, Botsaris, and Ladias (2012) tried to study the economic effects of operation of an A.E.I. generated by their operation and caused by their expenses, and the expenses of students and visitors as well. Alongside, studies have been conducted for the repercussions due to the creation and the dissemination of knowledge in the formation of capable human resources and strengthening the knowledge economy. For this reason a study conducted on the case of P. of Fthiotida and the operation of Higher Education Institutions in this. The main conclusions of the study were to enhance the local GDP by the students and to strengthen the human resources of the region.

The task of Professor **Th. Pakos** (2007), on the developmental effect of the University of Ioannina, has lead to the conclusion that the University Institute, since its foundation, contributes to the wider development of the Region. The author provides elements on the economic data of the Region of Epirus as well as secondary elements demonstrating the direct relationship between the University and the local economy.

In particular, a research of **Dimitriadis**, Chatzoglou, Theriou, and Madytinios (2003) on the influence of T.E.I. of Kavala in the city’s economic development,

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<sup>11</sup> There are also other cities of the country belonging in the same category, including Patra (Giffinger, 2007).

demonstrated the direct relevance of T.E.I. with the local economy. The influence of T.E.I. of Kavala is around 5 % of the local GDP and contributes to the job creation. At the same time, T.E.I. of Kavala attracts tourism as well because of the conferences and the cultural and other events conducted. The authors collect their data with the use of a structured questionnaire and the analysis of secondary economic elements relating to the city of Kavala.

In a research, conducted by **Konsolas et al. (2010)**, it is studied the interrelationship between a Higher Education Institution with the city or the Region that resides and concludes that the exploitation of an educational institution can support the local economy and society but simultaneously the central planning will contribute to the development of the unit as well.

If we look back in similar surveys we will observe that **Polyzos, Anastasiou, and Geraki (2013)** studied the developmental course of the small cities (*3500–20,000 inhabitants*) in Greece from 2001 to 2011 and they led to the conclusion that the education index is one of the most important independent variables.

**Metaxas (2012)** highlights the importance of education, the process of learning (*and providing programs of continuous training*), the promotion and the support of collaborations with the University Institutions of the wider Region and the educational institutions on business competitiveness and the development of local communities.

**Polyzos, Sdrolias, and Koutseris (2008)**, in a research conducted by them, demonstrate the direct dependence of local communities and enterprises with the national highways. The case study was concerning the Athens—Thessaloniki highway, where after the openings of the new national road, the local community has been directly affected, the unemployment has increased, even though the construction activity has increased. According to the authors “*the displacements of the roads have redistributive benefits. One is profited and someone else loses. However, there should be a concern for those who are directly affected by the new alignment. Incentives of relocation shall be provided to them or the possibility of a roadside access*”.

## 6 Research Methodology

During the preparation of the questionnaire we tried to shape it with the correct order, in order to be friendly both to the interviewer and to the responder. Therefore, we conducted sampling interviews in order to address the potential problems. In the part of sampling we tried to find the smaller possible subset (*as to its characteristics*) which represents the total of population of the three cities that operate Departments of T.E.I. The questionnaire includes closed questions with three answers “*Yes*”, “*No*” and “*DK/DA*” and it was relatively short so as not to tire the interviewee. We relied on the method of random sampling, the sample should not be less than 100 individuals and all of the interviews were anonymous (Babbie, 2011; Saunders, Lewis, & Thornhill, 2009).

The main advantage of this method is the fact that offers capable conclusions for a large population, it is a flexible method, the possibility of collecting large amounts of data is enabled and it is characterized by bigger reliability. Furthermore, the advantages of the questionnaire method are the economy, the speed, the possibility of impartiality and the confidentiality. The main disadvantage is the validity of the results, but it is also rigid, it's characterized by falseness and it generalises the results (Babbie, 2011; Saunders et al., 2009).

## 7 The Results of the Research

The questionnaire (*Annex 4*) is divided into three parts. The first part includes the demographic elements of the responders, i.e., the place of residence, the age, the gender, the educational level and the birth year. The second part includes 16 questions and we were asking from the responders to reply with "X" to the corresponding question. Among others, the questions which were relating to the contribution of the T.E.I. in the social, economic, enterprising, cultural development of the Region of Thessaly, in the dimension *smart cities* and finally to questions which were relating to the welcoming environment for the students and to the future prospects of T.E.I. The third part includes the comments and the observations the respondents. The data processing was performed by the SPSS and Excel.<sup>12</sup>

A total of 298 individuals replied to our questionnaire, 149 of which were men and 149 were women (*percentage of 50 %*). It is worth noting that the large number of the questionnaires shows the validity of the research as well, because it renders valid all of the questionnaires completed. 26.8 % of which are residents of Trikala, the 23.2 % of Karditsa and the 50 % of Larissa. According to their educational level, most of the respondents have degree of the higher education (56 %), the 32.6 % are High School graduates, the 6 % are graduates the compulsory education and the rest 5.4 % are possessing a postgraduate degree. From the correlations we conclude that statistically there is not a particular level of correlation between the two variables (*the gender and the educational level*) in comparison with other variables (*social development, smart cities, the strengthening of the local economy and others*). This means that both the gender and the educational level of the respondents are not affecting the total responses (Tables 1, 2 and 3).

The vast majority of the respondents consider that the T.E.I. it contributes to the broader development of the Region. In particular, more than 91 % consider that the TE.I. contributes to the social and economic development and strengthens the local economy. The 83 % considers that they are contributing to the enterprising development, and the 74.2 % to the technology and innovation. This percentage should be combined with the results presented in chart 6 where almost half of the

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<sup>12</sup> On the statistical analysis (SPSS) of data, Mrs. **Grigoriou Ioanna** has contributed, MBA.

**Table 1** Statistical elements

		Gender	Educational level
N	Valid	298	298
	Missing	0	0
Mean		1.50	2.6074
Median		1.50	3.0000
Std. deviation		0.501	0.68427
Minimum		1	1.00
Maximum		2	4.00
Percentiles	25	1.00	2.0000
	50	1.50	3.0000
	75	2.00	3.0000

**Table 2** The gender of responders

		Frequency	%	Valid percent (%)	Cumulative percent (%)
Valid	1	149	50.0	50.0	50.0
	2	149	50.0	50.0	100.0
	Total	298	100.0	100.0	

**Table 3** The educational level of responders

		Frequency	%	Valid percent (%)	Cumulative percent (%)
Valid	1.00	18	6.0	6.0	6.0
	2.00	97	32.6	32.6	38.6
	3.00	167	56.0	56.0	94.6
	4.00	16	5.4	5.4	100.0
	Total	298	100.0	100.0	

responders know that the cities of Larissa and Trikala are among the smart European cities (*smart cities*), a percentage rather disappointing. Finally, 2 out of the 3 respondents consider that it contributes to the cultural development of the Region.

We conclude that the most of the respondents consider that the T.E.I. is necessary for the wider Region and it should be remained at all costs, as well as the students that contribute to the configuration of the new culture. However, the percentage of 94 % consider that the removal of the T.E.I. would constitute a wound for the wider region. It is characteristic that most of those who answered that they wish the Institution's remaining, they do not have direct revenues (*rents and other*) by the students.

From the survey results, we conclude that the vast majority of the respondents, regardless their direct economic revenues from the students, consider that the T.E.I. is necessary for the wider Region and contributes to the viable and the sustainable development. The results are compared with those of previous researches, which highlight the importance of T.E.I. to the development of local regions.

## 8 Conclusions

We consider that the research should be performed in all of the 13 Regions of the country and especially in the cities that reside Institutions of the Higher Education. The results that we have presented cannot be generalized to all Regions, except to the corresponding Regions (*depending on the population and the Institutions operating in them*). The main difficulty we encountered was the fact that there were enough citizens that did not wish to answer the questionnaire. Furthermore, we ought to avoid the tendency of overgeneralization, i.e., to forget the restrictive terms arising from the sample we used and to consider that the answers represent the total of population of the Region.

We consider that it is necessary to promote and support the partnerships with the Institutions of Higher Education of the Region of Thessaly and especially with the T.E.I. In this way the education and the lifelong learning will be strengthened in order to improve the human recourses of the Region and to strengthen the competitiveness. The T.E.I. is not enough just to offer positions in order to attract students, as another educational tourism. The T.E.I. should contribute decisively to the strengthening of the Regional GDP and the entrepreneurship with its direct connection with the local community.

## Annexes



Annex 1. Map of the region of Thessaly. Source : [teilpostgraduate.blogspot.com](http://teilpostgraduate.blogspot.com)





Annex 2. Characteristics and criteria of the smart city. Source: Saitakis (2009), Giffinger (2007)

Researcher/Year	Sample	Examined	Conclusions
Katsogianni, M., Tsitsis, Chr., Printiotakis, G., & Tseles, D., 2014	Department of Textile Industry of T.E.I. of Piraeus and the local enterprise.	The effects of cooperation of a Higher Education Institution with the labour market.	The policy of collaborations has positive effects for both the T.E.I. and for the enterprises.
Polyzos, S., Anastasiou, An., & Geraki, M., (2013).	Greek cities including 3.500 – 20.000 inhabitants.	The developmental course of small cities in Greece.	The education index constitutes one of the most important variables to the development of small cities.
Genitaropoulos, Ch., Botsaris, Ch., & Ladias I., (2011 και 2012).	The Higher Education Institutions in the PE of Fthiotida.	The economic impacts and the repercussions on the human resources training.	The foundation and the operation of A.E.I. and T.E.I. in the PE of Fthiotida have a positive effect on the local economy and development
Konsolas, N., Papadaskalopoulos, Ath., & Christofakis M., (2010).	Higher Education Institutions.	The interrelationship of Higher Education Institutions with the local communities.	The exploitation of an educational institution can support the local economy and society but simultaneously the central planning will contribute to the development of the unit as well.
Polyzos, S., Sdrolias L., & Koutseris, E., (2008).	Highways of Greece.	How the new motorways have an impact on the local communities.	The highways are directly affecting the local economy of society ( <i>positively and negatively</i> ).
Metaxas, Th., (2012).		What the importance of education in the local communities.	The promotion and the supporting of partnerships with University Institutions of the wider Region and of the educational institutions with the competitiveness of enterprises and the development of local communities as well.
Pakos, Th., (2007).	The Uni. of Ioannina and the local community.	The developmental impact on the local communities by the Uni. of Ioannina.	The developing relationship between the local A.E.I. and the local economy, is immediate.
Dimitriadis, E., Chatzoglou, P., Theriou, N., & Madytinis, D., (2003).	The T.E.I. of Kavala and the local community.	The impact of T.E.I. of Kavala on the local community.	There is a direct correlation between the T.E.I. and the development of the local economy and community.

Annex 3. Concise presentation of indicative works related to the impact of higher education institutions on the local communities. Source: Personal elaboration of data

QUESTIONNAIRE ON THE ECONOMIC IMPACT OF T.E.I. IN THE REGION OF THESSALY

- City of residence : \_\_\_\_\_
- Regional Unit: Karditsa, Larissa, Trikala
- Profession : \_\_\_\_\_
- Birth Year: \_\_\_/\_\_\_/\_\_\_\_\_
- Gender : [Male] - [Female]
- Educational level : elementary, secondary, higher, postgraduate

Please rate the following sentences by marking X in the corresponding square

1. Do you believe that the T.E.I. helps to the **social development** of Thessaly?  
YES  NO  DK/NA
2. Do you believe that the T.E.I. helps to the **economic development** of Thessaly?  
YES  NO  DK/NA
3. Does the T.E.I. contribute to the development of **modern technology and innovation** in the Region of Thessaly?  
YES  NO  DK/NA
4. Do you consider that the T.E.I. contributes to the **enterprising development** of the Region of Thessaly?  
YES  NO  DK/NA
5. Do you consider that the T.E.I. contributes to the **cultural development** of the Region of Thessaly?  
YES  NO  DK/NA
6. Do you consider that the T.E.I. contributes to the **strengthening of the local economy**?  
YES  NO  DK/NA
7. Do you know anything about the existence of actions and collaborations of the T.E.I. with the local enterprising community of the Region of Thessaly?  
YES  NO  DK/NA
8. Do you know that **Larissa and Trikala** are considered as smart cities (*smart cities*)?  
YES  OXI  DK/NA
9. In your own work / enterprise, do you believe that a large part of your income to you is resulting from the students?  
YES  NO  DK/NA
10. Do you have any direct revenues from students (*rent, clothing store and other*)?  
YES  NO  DK/NA
11. Do you bother coming students in your city who have different ways of life. Is it giving you a hard time?  
YES  NO  DK/NA
12. Do you believe that the wider region of Thessaly is a hospitable environment for the students?  
YES  NO  DK/NA
13. Do you consider that Thessaly is better with or without students?  
WITH  WITHOUT  DK/NA
14. Do you believe that the T.E.I. is necessary for the economic development of your city?  
YES  NO  DK/NA
15. Do you believe that the removal of T.E.I. will be a "wound" to the Region of Thessaly?  
YES  NO  DK/NA
16. Would you like the remainder or the removal of the T.E.I.?  
YES  NO  DK/NA

Comments :

Annex 4. The survey questionnaire. Questionnaire on the economic impact of T.E.I. in the region of Thessaly

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**Part IV**  
**ICT Developments and Tourism: New**  
**Perspectives**

# A Stakeholder Perspective on Heritage Branding and Digital Communication

Adriaan De Man and Cristiana Oliveira

**Abstract** How does an archaeological museum understand its function in a digital environment? Consumer expectations are rapidly shifting, from what used to be a passive relationship with exhibition contents, towards a different one, in which interaction, individuality and proactivity define the visitor experience. This consumer paradigm is much studied in fast moving markets, where it provokes immediately measurable impacts. In other fields, such as tourism and regional development, the very heterogeneous nature of the product to be branded makes it near to impossible for only one player to engage successfully.

This systemic feature implies that museums, acting as major stakeholders, often anchor a regional brand around which SME tend to cluster, and thus assume responsibilities in constructing marketable identities. As such, the archaeological element becomes a very useful trademark. On the other hand, it also emerges erratically on the Internet, in personal blogs, commercial websites, and social networks. This forces museums to enter as a mediator, authenticating contents and providing credibility. What might be called the digital pull factor poses specific challenges to museum management: what is to be promoted, and how, in order to create and maintain a coherent presence in social media? The underlying issue this paper tries to address is how museums perceive their current and future role in digital communication.

**Keywords** Portugal • Museums • Archaeology • Social networks

**JEL Classification** Z100

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## 1 Introduction

Local cultural systems, their particular forms of governance, and the cluster-specific factors they operate on, such as territorial proximity and actor linkages, are frequently supported by museums. A study on urban contexts (Lazzeretti & Cinti, 2009) points out that it is above all the state and local public bodies that provide the main management resources, an idea extendable to other geographies. This is even more so in rural contexts, where museums act as key stakeholders, using public monies yet providing distinctiveness and coherence to producers and entrepreneurs alike (De Man, 2014). Heritage-based branding and brand heritage itself (Hakala, Lätti, & Sandberg, 2011) are very much intertwined, which is why they are transversally used by companies as an “easy” marketing tool. But market response depends on a number of variables, not controlled by most producers, yet needed for successfully operating the image of a site, a historical city, or a cultural landscape (Deffner & Metaxas, 2010; Ryan & Silvanto, 2010). The creation of a territorial identity around such features forms a basis for socio-economic development and competitiveness (Anholt, 2007; Raszkowski, 2014). In other words, in order to benefit from an archaeological trademark, local players need a strong authenticator, a position frequently assumed, knowingly or not, by a museum.

A second encompassing notion to be considered is that of a steadily growing and transversal use of social media in archaeological site management, whether expressly museum-based or at other levels of administration. This can be seen as part of a much wider relationship between consumers and service providers, but the cultural sector poses different challenges to the latter. Museum services are perceived as authenticating (Howard, 2002), in a nowadays easily verifiable environment—a visitor with a smartphone may defy an entire exhibition in a matter of seconds. Additionally, archaeological site-based knowledge is intrinsically local and changes slowly, thus appearing to be of a different order than the dynamic and negotiated processes social media works with (Boast, Bravo, & Srinivasan, 2007). There are indeed many threats and challenges to the more traditional forms of cultural production (Throsby, 2010). Both approaches combined, that is, the economic and social dimensions, are to be seen in a functional continuity, which does not mean that culture is to become entirely submissive to capital, nor that many archaeological museums will ultimately become self-sufficient from a funding perspective.

## 2 Literature Review

The last decade has witnessed a widespread attention by academia towards the professional use of social media, including on the concept itself (Kaplan & Haenlein, 2010). In strict normative terms, it may be argued that they are not media at all (Drotner & Schrøder, 2013). In any case, social media differs greatly



form other computer-mediated forms of communication (Treem & Leonardi, 2012). This seems self-evident in a corporate setting, where consumers constantly provide input, and provoke organizational changes (Hutton & Fosdick, 2011). In the wider public sector as well, collaborative forms of e-government (Bertot, Jaeger, & Grimes, 2012) are gaining space over bidirectional channels. This clearly depends of the nature and purpose of the entities, even considering the range of state-operated public services. Some (Looseley & Roberto, 2009; Parry, 2010; Russo, Watkins, Kelly, & Chan, 2008) have addressed a number of questions about how a museum in particular can or should communicate digitally. Either one-to-many channels, such as webpages and blogs, or many-to-many (knowledge to knowledge, that is, wikis) are forms of transmitting and updating information, if one excludes the individual means such as emails. The new part museums play in the digital world is something curators and other professionals have been reflecting on for some time now (Graham & Cook, 2010; Kelly, 2010; Proctor, 2010), but do not always find appropriate ways to align clearly (Kidd, 2011). Trust and accuracy are an important part in this complex relationship (Parry, 2013), and these are uncontrollable in certain dimensions that escape consented delegation. One very clear function of an archaeological museum is to allow the visitor to construct his own narrative, in which social media plays an important role (Weilenmann, Hillmann, & Jungselius, 2013). The tourist experience has much more to do with an overall feeling of authenticity than with academic authenticity (Knudsen & Waaden, 2010; McKercher & du Cros, 2002; Morgan, Lugosi, & Ritchie, 2010). It is basically the former that is transmitted via Facebook and Twitter. Feedback through social media is proven to be paramount for museums to obtain new insights (Charitonos, Blake, Scanlon, & Jones, 2012). It is only based on responses that institutions may segment and quantify, and ultimately make calculated choices about communication.

From the museum's point of view, the impacts of well-managed social media are not only interesting regarding the number of visitors. They also penetrate the local economy, by providing direct employment, but especially by anchoring a brand. A very large commercially relevant features are attached to the image of an archaeological site, either in the countryside or in the city, where place branding often becomes harder to analyse due to a multiplicity of players and factors (Hankinson, 2015; Kaplan, Yurt, Guneri, & Kurtulus, 2010; Kavaratzis & Hatch, 2013; Medway, Swanson, Neirotti, Pasquinelli, & Zenker, 2015), as well as to lack of precision in measurement (Zenker & Martin, 2011).

### 3 Methodology and General Analysis

This paper seeks to identify how Portuguese archaeological museums look at their function and purpose in a digitally active society, and how they interact with social media. Data interpretation was realized by using interviews to obtain qualitative responses, as well as three variables, namely the existence or not of digital contents,

of control of social networks, and of the number of social media used for communication. Results are presented as a BCG matrix.

In order to infer whether different museums with archaeological collections have similar concerns about social networking, a number of interviews were carried out during April–May 2015, not only in the Lisbon area (Museu Arqueológico do Carmo, Museu Nacional de Arqueologia, Museu Calouste Gulbenkian, and Banco de Portugal), but also in low density areas such as Terras de Sicó, where Conimbriga is located, and Mértola, deep in the rural Alentejo. Based on these interviews, it is possible to recognize a strong interest in adhering to social networks, even with little or no strategy involved. From the different museums' standpoints, it is fundamentally important to be present simultaneously on several platforms to attract new publics, an effort being put into using a specific language for each one. One clear exception is the museum of the Bank of Portugal, which chooses not to commit to social networks, such as Facebook, because a more conservative image is openly preferred, by investing in a webpage. The museum space furthermore finds itself well integrated in tourist itineraries, and targets essentially foreign, as well as some domestic tourists. On the other hand, its exhibition has a strong digital component, with an effort to introduce technology to the advantage of the visitor.

The museums with greater technological perspectives, at the level of providing contents and also of social networks, are the Gulbenkian museum, with a very well known ancient art collection, and the Centre of Modern Art, both managed by the Calouste Gulbenkian Foundation, in the same physical area. They are investing in multiple social networks, especially Facebook and Twitter. Although these two examples are not integrating any specific tourist itinerary, they are heavily capitalizing on digital platforms to reach out to tourists, in particular through multi-language interfaces. With regard to national tourists, there is a perception that they are not the main users of these platforms, as Portuguese tourists prefer a direct interaction with the museum assistants who are present in the museum, that is, favouring a more personalized service. Social networks are already used as source of dissemination of exhibitions and events, mainly in the Centre of Modern Art, and there is a strong adherence to this information by the visitors, especially given the fact that they attract a younger audience.

Regarding the National Archaeological Museum, it seems to have a weaker position vis-à-vis technology, both at the level of digital interfaces and social networks. Although they are present in eight different networks—including Twitter, Facebook and a blog—the interview showed a planned control over these platforms appears to be lacking. The museum also claims that their main audience is composed of foreign tourists, who typically are not previously informed about the museum features, and that they visit essentially because of the setting, conveniently located in a tourist area. Technological means of exhibition are not present in the museum and there is no intention for making such an investment.

Looking at the BCG matrix, the National Archaeological Museum finds itself clearly placed as the weakest, in terms of self-perception about digital integration, whereas the Calouste Gulbenkian Foundation museums are most positively placed.

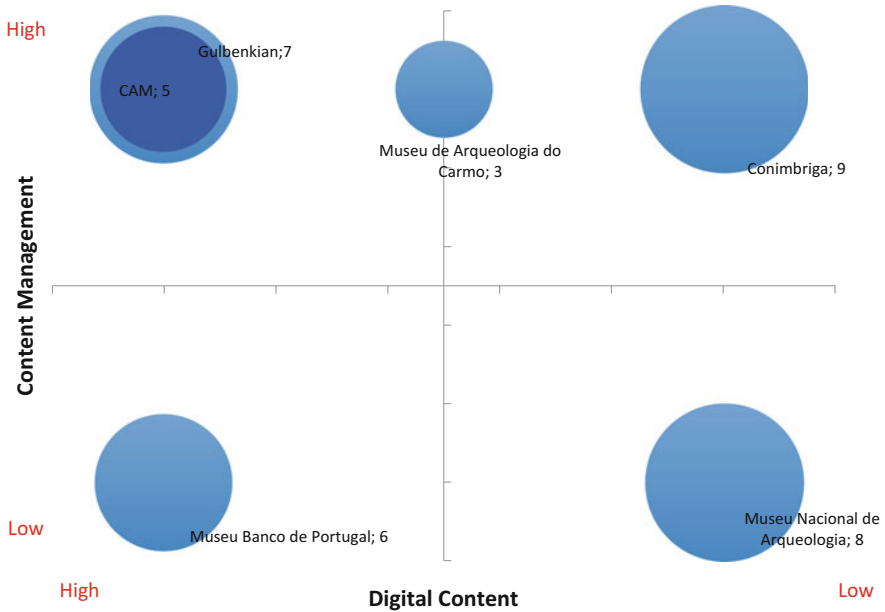


Fig. 1 Social network and content management analysis. Size reflects number of social networks

The circumstance of being very much present on multiple networks, whilst creating digital and interactive contents, positions these two museums favourably towards two rather different audiences, domestic and international alike (Fig. 1).

#### 4 Results, Comments on a Case Study

One illustrative case study is that of the Conimbriga site museum, located in what is considered to be a low-density area in central Portugal. Here the museum acts as a key stakeholder in terms of employment, and of projection of a commercially significant distinctiveness; a number of SME indeed use elements related to local archaeological heritage for market positioning. Many of these have nothing at all to do with museology or heritage studies; they range from a local construction company to a photo studio, apart from the more obvious cases in the tourism industry. They all free-ride directly on the image of an archaeological site, which communicates not commercially but in its own terms and scope. The museum is comparatively very active in terms of digital communication, and extends its marketable capital to the entire region by acting as a cultural hub. In terms of differentiating communication strategies, there is a clear segmentation approach, meaning that not all information is produced and provided equally. This course of action seems logical and is present in other museums but with less effective outcomes. That is, when asked to define how social media is used, differentiation

is rarely mentioned as relevant, and media interaction is determined more by the features of the channel (e.g. character limit) than by the target. A directed interview with the PR responsible for Conimbriga was quite revealing on how this issue is perceived.

Each programme and initiative Conimbriga promotes has a specific audience. As a norm, we try to adapt communication to each public. However, for it to be as wide as possible, all means of communication we can use are added. Communicate, communicate, communicate. . . it is never enough, being one of the goals of the museum.

And about social media in particular:

Each digital channel has its own specificity. From the rather short Twitter messages to the promotional videos on Youtube, and to a more informal language on Facebook. In the museum newsletter and in the press, a more institutional, or even formal tone is used. There is a concern about adapting the language according to each communication channel, as those who follow us are very different audiences, with different expectations. Although we consider to be essential in the digital platforms to use an attractive, appealing and informal speech, we must bear in mind that this is an institution with a strong scientific legacy, and therefore language must be adapted.

Further thoughts on the meaning of digital visibility and interaction have to do with two vectors. On the one hand, there is a social function to museum policies, which is not achieved without adequate outreach, social media having become a natural extension of pre-digital means. On the other, attracting more visitors is an end in itself to a museum yearly positioned in a public national ranking, in which metrics regarding visitors turn out to be a primary variable. Since the museum manages a Facebook page instead of a profile, some quantification on digital visitors, and on their preferences, is also starting to become available, although still without statistical significance. 22% of their followers are between 25 and 44 years of age, but no more than 0.6% are 18 or younger. This relates directly to the nature of this very distinct cultural product, which in its current form does not appeal to a younger public in the same measure as it does to other age segments. This may be an opportunity to explore more carefully in the future.

Content is adapted not only formally but is also selected according to its nature. This means the museum is not channelling strict scientific production, but rather an occasional press release on a new book or an open meeting. Yet the daily feeds consist in small messages, curiosities about the site, cultural programmes, specifically avoiding extensive information. A very popular regular type of post is called “Did you know that. . .?”, followed by a picture, often a black and white photo of the old excavations that took place during the early and mid-twentieth century.

But based on such a specific positioning, how does the museum transfer its identity to the wider region, and above all, why does it invest in it? There is a straightforward perception of market integration:

To communicate means also that the local community—where Conimbriga’s potential partners are active—remains conscious about the activities we carry out, and that it feels the weight of the trademark Conimbriga.

## 5 Conclusion

Social media can be used as a valuable extension for museum communication, and Portuguese archaeological museums have quite different perspectives on how to use them. Manipulating (i.e. authenticating) therefore requires a strategy that may deviate the capacity for effectively performing that same function. For instance, it is manageable for a museum PR service to maintain an official Facebook page and regularly screen its activity. But to control the vast majority of information circulating on the Internet is not. So the question arises of how much of the traditional functions of intermediation between a site or an exhibition, on the one hand, and the visitor, on the other, are museums willing or capable to authorize and delegate. There is a clear distinction with the controlled environment of the museum itself, where digital advances occur in a sort of closed circuit, either in service providing or content management, even if the collections are publicly accessible through a website (Bertacchini & Morando, 2013; Srinivasan, Boast, Becvar, & Furner, 2009; Yeh, Chang, & Oyang, 2000).

Comprehensive inferences are hampered by the fact that argumentation is built on a qualitative basis, namely the impressions of museum managers. Future research will require a strong quantitative input to consolidate the weight of digital communication, as archaeological museums currently perceive it. Working hypotheses need to tackle the correlations between a selective, differentiated use of social media and a multiplier effect to the benefit of regional economies.

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# Top European Museums on Twitter

Vasiliki Vrana, Kostas Zafiroopoulos, and Konstantinos Antoniadis

**Abstract** Recently, museums worldwide started to use social media and have developed initiatives to provide widespread access to museum information resource, engage audiences and attract more visitors. Twitter, the most popular microblogging platform, allows museums to spread small time-sensitive amounts of information and transform audiences from passive observers into active participators. However, little research effort has been devoted at investigating the use of Twitter by museums. The paper aims to fill this gap and records the top-60 European museums and their Twitter accounts. Eleven Twitter performance indexes are used to describe the activity and performance of these accounts. Descriptive statistics, Principal Components Analysis and correlational analysis reveal that there is a significant differentiation among museums regarding Twitter performance. Performance of the accounts is described using three principal components: networking, tweeting activity, time that the account is active and involvement. A group of the more active museums on Twitter is constructed. Partially, Twitter performance is in accordance with museums popularity and ranking, while there are a significant proportion of museums which do not use Twitter. Implications and suggestions are provided for the museums to use Twitter as a marketing and promotion channel, especially for the museums which are placed lower within the ranking list.

**Keywords** European museums • Twitter • Performance • Activity • Popularity

**JEL Classification** M15

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## 1 Introduction

Museums are important heritage destinations and generators of income (Silberberg, 1994). In many destinations they are primary tourist attraction for foreign and local tourists (Jansen-Verbeke & Rekom, 1996). Deffner, Metaxas, Syrakoulis, and Papatheohari (2009, pp. 58–59) claimed that museums act as ‘the instruments’ for cities in the development process. It is interesting that 3 out of 10 tourists that visited London visited the city for its museums (Corbos & Popescu, 2011). Museums in order to be profitable, are marketing themselves as heritage destinations and tourist attraction (Kirshenblatt-Gimblett, 1998). Nowadays, challenging economic times and reduction of museums budgets has put increasing pressure on museums to widen their appeal and to attract more visitors (Chan, 2009; Goulding, 2000). Thus, museums explore new ways to increase attendance levels and self-generated revenues (Silberberg, 1994).

Alpers (1991) described the museum as a ‘way of seeing’, where objects are isolated from their world and displayed for attentive and interpretive seeing. Still, museums are places of collecting and seeing. However, as museums are becoming more visitor-oriented they try to facilitate experiences that satisfy their visitors and to incorporate ‘aspects of mediatized, embodied, and communal gazing in visitor’s experiences’ (Chan, 2009; Larsen & Svabo, 2014 p. 2) and have adopted a wide range of digital and mobile technologies for creation of awareness of the organization, promotion of events and exhibits, provision of customized experiences, engagement with stakeholders and cultural production (Chen, 2015; Thomson, Purcell, & Rainie, 2013). Digital technologies and new social media are determining factors in museum’s self-identification and are changing societal roles (Holdgaard & Klastrup, 2014). Simon (2010, p. 2) defined the museum as a cultural institution ‘where visitors can create, share, and connect with each other around content’.

Social media adoption is a global trend that has the potential to change social lives both on interpersonal and community level (Ellison, Lampe, & Steinfield, 2009). Social media such as Twitter, Facebook, YouTube and Flickr are a two-way communication channels (Huvila, 2013) offering organizations tools for engaging in dialogue with their public and the opportunity to become more social and participatory. Social media provide museums with flexibility, personalization, interactivity and an opportunity for collaboration between museums and their public (Capriotti & Kuklinski, 2012). Thus, museums and other organizations are trying to keep up with this changing environment and to implement social media to their benefit (Effing, van Hillegersberg, & Huibers, 2011). For museums social media is an instrument for outreach to the public, promotion of exhibitions, organization of participatory projects, conversations and debates with potential visitors and capture a global audience’s attention for their collections (Villaespesa, 2013). Moreover, social media have the potential to transform visitors from passive observers into active participators and content creators (Holdgaard & Klastrup,

2014) as they post photos taken during their visit, express their opinions and experiences and share content about the museum (Villaespesa, 2013).

Twitter, the fastest growing social network by active users (Vincezini, 2013), is a microblogging service that allows users to share information via short messages with a maximum of 140 characters in length and to answer the question: ‘What’s happening’ (Chu, Gianvecchio, Wang, & Jajodia, 2010; Naveed, Gottron, Kunegis, & Che Alhadi, 2011). Museums attracted by a potentially large audience of Twitter and the easy-to-use platform started join Twitter. By the start of 2010, over 1000 institutions in 34 countries had joined Twitter (Museum Marketing 2014) and this number grows exponentially. It is interesting to understand the use of Twitter by museums, as they appeal to present, future and potential museum visitors (Lossing, 2009), however research is very limited. Thus, the paper aims to fill this gap and records the top-60 European museum’s Twitter accounts. It aims at describing the activity and performance of these accounts and it associates their Twitter performance to their general popularity and impact. Differentiations among museums regarding Twitter performance are reported.

## 2 Twitter

Twitter microblogging platform was officially launched in October 2006 (Krishnamurthy, Gill, & Arlitt, 2008). Microblogging platforms provide an easy form of communication and enable users to broadcast and share information about their opinions, activities, and status (Java, Song, Finin, & Tseng, 2007). Today, Twitter is one of the most popular sites worldwide as it has a global Alexa rank of 8 (Alexa, 2015). Total number of Twitter registered users are about a billion (DMR, 2015) while 288 millions of them are monthly active users (Twitter, 2015). Users post about 500 million tweets per day (DMR, 2015).

Registered users may post short messages, less than 140 characters, republish another’s tweet (RTretweet), write mentions—tweets addressing a specific user- or tweet directed at a certain user via @reply. They may follow hashtags, metadata tags that group tweets by topic (‘#’ followed by a word), create lists of accounts to follow, search through the Twitter chatter and participate in trending topics (Hargittai & Litt, 2012; Kwak, Lee, Park, & Moon, 2010; Sousa, Sarmiento, & Rodrigues, 2010).

A Twitter user ‘A’ may follow another user ‘B’. That means that the user ‘A’ is subscribing to the ‘B’ user’s Tweets as a follower. His/her updates will appear in ‘A’ user’s Home tab. That person ‘B’ is able to send the user ‘A’ Direct Messages. The vast majority of Twitter accounts are public, in the vein that can be viewed by anyone of the Twitter users who subscribes to view the tweets (Marwick & boyd, 2010). The relationship of ‘following’ is not mutual as a user can follow any other user, and the user being followed need not follow back (Hargittai & Litt, 2012; Kwak et al., 2010). Thus, some users follow a few, while others follow thousands. Some follow only users that they know personally, while others follow celebrities

and anyone that they find interesting (boyd et al., 2010). This highly skewed distribution has also been recorded at followers. Some Twitter accounts exist that attract enormous number of followers while the majority has only a few followers (Bakshy, Hofman, Mason, & Watts, 2011; Huberman, Romero, & Wu, 2009; Kwak et al., 2010).

In the world of Twitter, social networks are being created via followers' relationships, retweets, @replies and #hashtags, (Sousa et al., 2010).

### 3 Museums and Social Media

Nowadays, social media are gaining more and more popularity among museums and other cultural organizations as they are a natural complement to the work they are doing on site and platforms that enable performing educational, marketing and engagement-focused practices (Kidd, 2011; Langa, 2014). Museums use social media in order to get more audiences and visitors, to engage the existing ones, to communicate their activities and exhibitions, to grow institution's reach between and around individuals and communities, to build and sustain communities of interest around the museum and to increase public engagement (Kidd, 2011; Spiliopoulou, Mahony, Routsis, & Kamposiori, 2014; Tuğbay, 2012). Their flexibility, ease of use and speed of content publishing has resulted in public's active participation and creation of user generated content (Agichtein, Castillo, & Donato, 2012; Fletcher & Lee, 2012). Social media offer the possibility to museums' visitors to express their experiences, and upload their own photos and videos taken during their visit. In this vein, use of social media transforms visitors from passive observers into active participators, creators and museum's ambassadors (Holdgaard & Klastруп, 2014; Kidd, 2011; Villaespesa, 2013).

For the moment little research effort has been devoted at investigating adoption and use of social media by museums and especially on Twitter. Alexander et al. (2008) investigated how museums build and maintain web video channels on YouTube. Participating institutions completed a survey outlining background information on their projects and statistical data from YouTube about the channel and their videos. Findings reveal that posting video content on YouTube benefits the institution. However, museum videos generate a small number of comments and dialogue comes from a small number of active community members. Most visitors to YouTube are interested in specific topics and looking for contents around those topics and are not searching for the term 'museum'. Russo and Peacock (2009) suggested that social media should be viewed as living systems. Thus, it is a challenge for museums to support the health of the ecology of the systems by maintaining the right level of contribution, understanding and nurturing their dynamics and carefully examine interests, motivations and rewards that drive others to the systems. Later on, Lopez, Margapoti, Maragliano, and Bove (2010) examined the extent to which museums have adopted Web 2.0 tools on their websites. Two hundred and forty museum (arts, natural sciences, social sciences,

and specialized) websites in Italy, France, Spain, England, and the USA were analyzed. A low overall presence of Web 2.0 tools on museum websites was recorded. Significant differences in the use of Web 2.0 tools were also recorded among countries and different museum categories. Kidd (2011) highlighted the increased use of social media in the museums sector in the UK and investigated the frames within which social media activity is being experienced. From her findings it is evident that a gap exists between the possibilities offered by social media and their use by museums. She proposed that it is crucial for museums to better understand the frames within which such activity is being encouraged and experienced. Bocatus (2011) focused on the question 'What kind of Web 2.0 elements are already being used for Museum Education Services on-line'. She took into consideration the Jewish Museum in Berlin, the Städel Museum in Frankfurt and the Brooklyn Museum in New York. The findings from the case studies indicate that adoption of Web 2.0 by museums is still at an early stage but museums are getting more and more aware of it.

Fletcher and Lee's (2012) purpose of study was to investigate how American museums are using social media. They collected 315 online surveys among American museums, and conducted nine in-depth interviews with professionals working with social media. Results indicate that involvement with social media is considered important. However, American museums use Facebook and Twitter mostly as one-way communication channels. Their social media strategies are focusing on event listing, reminders, and reaching larger or newer audiences by increasing the number of fans and promotional messaging. Pett (2012) demonstrated how social media can be used for museums' marketing, for fostering multi-vocal dialogue, and creating a strong online brand. He claimed that when social media are correctly used, the results are extremely beneficial to a museum engagement with a wider audience. Social media use, in order to be successful, demands a clear strategy, commitment, resources and personnel, directorate buy-in, marketing nous, a unique selling point and a fan base to cultivate. Capriotti and Kuklinski (2012) assessed the level of dialogic communication developed on the Internet by 120 museums in Spain. They analyzed the use of web platforms and social web applications as tools for dialogic communication. Their findings showed that museums are not using all the advantages that the Internet offers for interactive, multidirectional and symmetrical communication. Museums make a very limited use of social media. They use social media mostly for one-way communication and share passive information. Chung et al. (2014) explored the use of social networking services by art museums and their effectiveness as marketing tools. Twelve museum staff participants in the Midwestern United States were interviewed. Three distinct marketing applications were identified for which social networking services were being used: building awareness, engaging with the community, and networking. They claimed that Twitter is 'suitable for spreading small amounts of information that may be time-sensitive, such as events of the day, exclusive offers from the museum store, or a special tour of the exhibition', while Facebook is suitable for longer, richer, and more conversational information.

Regarding Twitter Osterman, Thirunarayanan, Ferris, Pabon, and Paul (2012) explored the different ways that the Smithsonian's Hirshhorn Museum and Sculpture Garden use Twitter to engage audiences. They collected and analyzed tweets over a 6 months period of time. Their findings suggest that the two museums use Twitter in a consistent manner, focusing on: sharing links and resources, publishing upcoming activities and announcements and museum staff commentary or criticism. Moreover, they are trying to form active two-way communication and to engage creatively the public to utilize new social media tools. Villaespesa (2013) investigated the significant role that Twitter played during the festival 'Art in Action' at 'The Tanks', Tate Modern's new space dedicated to live art. She analyzed the tweets that mentioned 'The Tanks' during that period and covered the process of collecting, coding and analyzing the data following three different lines: Twitter as a communication tool, as a conversation tool to engage with the visitors and as an audience research tool. In a more recent study Langa (2014) tried to understand more about the relationship building that museums are engaging in using Twitter. She employed quantitative counting and categorization of content tweeted by a purposeful sample of 50 museums. In order to investigate level of engagement she used six dimensions: count, reliability, content, find ability, frequency and engagement. Half of museums in the sample had a higher number of followers than the institution followed. A large number of museums in the sample focused on original content in their Twitter feed and the highest portion of them was cross-referencing social media platforms in their Twitter postings, like Instagram photos and Facebook posts. The majority of the sample was tweeting several times a day, however remarkable differences were recorded in frequency across disciplinary type of museum. Regarding engagement two types of activities were observed: participation such as museum replies to users who had already posted to the museum account and dialogic activity between a museum and a user.

## 4 Methodology

According to <http://www.europe.org> the ranked list of the top European museums was searched. The recording was done during 2–5 March 2015. Sixty top European Museums, according to the popularity and the famous works of art they have in their possessions, were recorded. For economy the top-20 museums are described here: The National Gallery, Musee du Louvre, Galleria degli Uffizi, The Hermitage Museum, Rijksmuseum, Museo del Prado, Vatican Museums, British Museum, Alte Pinakothek, Gallerie dell' Accademia, Tate Britain, Schloesserland Sachsen, Van Gogh Museum, Galleria Borghese, Melngalvju nams, National Archaeological Museum, Bodemuseum, Guggenheim Bilbao, CentrePompidou and Musee d' Orsay.

For each museum its Twitter account (if one exists) was recorded, and several Twitter activity indexes were recorded as well: top content 8 tweets, Topsy score, number of followers, number of followers the accounts talked with, number of

accounts following, tweets per day, number of tweets, photos and videos tweeted by the accounts, number of favorites, number of lists an account belongs to, and time since the accounts are active. Also, the rank of each museum was recorded. Number of followers of an account, number of other accounts an account follows (following), and number of tweets, are recorded since it is supported by the literature that they are indicators of Twitter performance (Anger & Kittl, 2011; Bakshy et al., 2011; Bayram & Arici, 2013; Crump, 2011; Rossi & Magnani, 2012; Sevin, 2013). Topsy score is a complex index provided by Topsy.com social search and analytics site, which takes into account the retweets and mentions than matter for a particular Twitter account, as a measure of users community involvement for this account. Top content 8 tweets is the total number of replies that these tweets get. It is a measure of effective reach that an account has to its followers. Number of followers the accounts talked with is the number of conversation they had on social media. The indexes are provided by Twtrland.com, Topsy.com and by using NodeXL for Windows.

The findings include the presentation of the descriptive statistics of the abovementioned indexes. Next, a Principal Components Analysis with Varimax rotation is used to produce components of the indexes in order to better describe and understand the activity of the Twitter accounts. According to the produced factor scores, a group of the most active, on Twitter, accounts is located. This group consists of the accounts that have at least one factor score (out of the three calculated), over unity, since it is known that factor scores are standardized having means equal to zero and standard deviations equal to one. Factor scores over unity are considered to indicate high factor scores and consequently large values of the activity indexes associated with the factor scores. This group is described in detail. Finally, correlation coefficients are calculated among factor scores of the accounts and the relative ranks of the museums that the accounts belong to (within the list of sixty museums). Conclusions are drawn from these correlations.

## 5 Findings

Fifteen out of the 60 museums (25 %) do not have a Twitter account. Four out of the top-20 museums do not have a Twitter account. Table 1 presents the descriptive statistics of the recorded indexes. The older account was created on April 2007 (Tate) while the most recent account is that of Galleria degli Uffizi, February 2013.

Regarding the distributions of the Twitter performance indexes, Skewness ranges from 1.4 (tweets per day) to 5.8 (numbers of accounts following). The medium positive values of Skewness imply that there is a tendency for some museums to have high values of the indexes while most museums have low values.

Standard deviations are higher than the means especially for number of following and followers and Topsy score. There is a great differentiation regarding the indexes among the museums' Twitter accounts. This can be considered to be in accordance with Skewness.

**Table 1** Descriptive statistics for the Twitter performance indexes

	Median	Mean	Std. deviation	Skewness
Following	442	1965	6625	5.8
Followers	3089	93,215	230,527	4.3
Photos and videos	192	532	812	3.2
Favorites	2945	1306	2328	2.9
Topsy score	145	2703	6014	2.6
Top content (8 tweets)	95	839	1576	2.3
Tweets	2046	4294	5620	2.1
Lists	0.5	2.52	3.9	2
Talked with	29	247	442	1.9
Tweets per day	1.4	2.4	2.5	1.4

**Table 2** Principal components analysis of the Twitter performance indexes

	PC 1: networking	PC 2: tweeting activity	PC 3: time active and involvement
Top content (8 tweets)	0.891	0.314	0.027
Topsy score	0.864	0.378	0.111
Followers	0.792	0.202	0.282
Talked with	0.789	0.523	0.145
Following	0.709	0.057	-0.094
Tweets per day	0.204	0.896	0.290
Tweets	0.261	0.875	0.348
Photos and videos	0.410	0.824	-0.037
Favorites	0.163	0.785	0.001
Lists	-0.106	0.102	0.882
On Twitter since	-0.429	-0.192	-0.641
Total variance explained	56 %	14 %	10 %

On average a museum tweets 2.4 times a day, which could be considered a fairly high value for such an organization. Half of the museums have less than 3000 followers and low Topsy scores. On the other hand, the average followers value is 93,215 and the average Topsy score is 2703. Differentiation among the museums is obvious for all the indexes, but it especially apparent for number of followers, Topsy score, number of tweets and number of accounts the museum account talked with. In this sense, Twitter activity is hardly uniform.

A Principal Components Analysis with Varimax rotation using the eleven indexes produces a three factor solution. The total explained variance is 80 % (Table 2). The first PC is correlated with top content, Topsy score, number of Followers and number of Following, number of account talked with. It summarizes the networking ability of the museums accounts. The second PC summarizes the tweets per day, total number of tweets and number of photos and videos. It is the tweeting activity that the second PC is presenting. The third PC summarizes the age

**Table 3** Correlations between museums ranks and Twitter activity factor scores

	Museum rank
PC 1: networking	-0.437*
PC 2: tweeting activity	-0.219
PC 3: time active and involvement	0.133

\*p < 0.01

of the account and the number of list that the account belongs to. Time that the account is active (age) and involvement could be the name of this PC.

These three Principal Components are used for two purposes: first, it is interesting to use them to explore whether there is an association between Twitter performance and general popularity of the museums as it is described by the museums rankings within the top-60 museums list, and second to use them to locate the most the active museum Twitter accounts.

To explore if there is an association between factor scores and original rankings, correlation coefficients are calculated between factor scores and museum rankings (Table 3). A medium but statistically significant correlation coefficient is calculated for PC1 (networking), -0.437. The more popular a museum is the most active and connected its Twitter account is. This tendency describes a context where popularity for the museums is nearly universal, popular museums tend to be also popular on Twitter. Twitting activity and Twitter involvement of the accounts are not associated to popularity of the museums.

To locate the most active Twitter accounts we apply a simple procedure that takes account of the PCA factor scores. Since the factor scores are standardized, values over unity are considered big. So the museums that have factor scores over one are performing well on the relative principal component and on the original indexes associated with that principal component. We can construct a group of the most active accounts if we consider the accounts which have at least one factor score, out of three, which is over one. That is a Twitter account belongs to the group if it performs well at least in one PC. There are eight museums accounts which satisfy this criterion. The museums and the indexes of their Twitter accounts are presented in Table 4. The museums are Museo del Prado (high values in PC2), British Museum (high values in PC1), Tate Britain (high values in PC1, PC3), Neanderthal Museum (high values in PC3), Centre Pompidou (high values in PC2, PC3), Museo Reina Sofia (high values in PC2), CCCB (high values in PC2, PC3), Mercedes-Benz Museum (high values in PC3). Regarding each principal component, the British Museum and Tate are performing better in networking, Centre Pompidou, Museo Reina Sofia, and CCCB are performing better that the others in tweeting activity. The Tate Britain, the Neanderthal Museum, Centre Pompidou, CCCB and Mercedes-Benz Museum are performing better regarding involvement and time they have been active.



**Table 4** Top museums according to general Twitter performance (at least one factor score over 1)

Museums	Tweets	Following	Followers	Favorites	Lists	On twitter since	Photos and videos	Topsy score	Talked with	Top content (8 tweets)	Tweets per day
1. Museo del Prado	25,700	887	361,000	7987	2	Oct-2008	4508	16,280	1180	2581	11
2. British Museum	10,500	42,400	476,000	4362	0	Jan-2009	2371	24,481	1713	6693	4.7
3. Tate Britain	10,000	1142	1,350,000	577	4	Apr-2007	1230	22,851	1408	5427	3.5
4. Neanderthal Museum	2634	2226	3387	858	17	Nov-2009	188	58	67	73	1.4
5. Centre Pompidou	16,600	484	246,000	1224	12	Aug-2008	1170	3343	805	907	6.9
6. Museo Reina Sofia	10,600	1120	197,000	11,700	2	Feb-2009	841	4978	431	1111	4.8
7. CCCB	18,700	1741	81,500	1533	11	May-2009	1016	2290	341	271	8.8
8. Mercedes-Benz Museum	1237	10,600	30,000	424	11	Jan-2009	177	1289	35	876	0.6

## 6 Conclusions

The paper described the Twitter appearance and activity of the top-60 European museums. It recorded the museums accounts, in the cases that these accounts exist. Eleven Twitter performance indexes were recorded for each account. There is a significant proportion (25 %) of the European museums which do not use Twitter. For those which use Twitter, there is a significant differentiation regarding usage and activity. Partially, Twitter activity is in accordance with the museums popularity and ranking. This association is evident especially for the networking indexes and indexes regarding number of people that the accounts are connected to. Popularity of the museums tends to be transferred also on Twitter. However, this tendency does not constitute an association in an absolute manner. There are museums which perform well on Twitter but they are not listed high in the museums ranking list, as it is evident from the group of the best performing museums on Twitter.

A museum can be a destination in and of itself. Tourism and destination management could take advantage of the promotion and visibility of museums to attract visitors. Besides the established original reputation of the museums, presence and visibility in the social media might be used as a marketing tool to attract more visitors and tourists especially for the museums having low popularity rankings.

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# Social Media and Tourism: A Digital Investment for Thessaly?

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**Abstract** The development of social media has been reported to have reshaped the tourism industry, as in general revolutionary information and communication technologies have deeply affected the society and its overall functioning. Facebook and Tripadvisor are two of the applications mostly discussed that do have an important impact on the image of the companies associated with the sector.

The contribution of Greek tourism in the country's economy has been highlighted several times over the years. However, not all the regions contribute equally. More specific, coastal areas and islands that represent the core Greek tourist product, sea and sun, are the most popular ones. Others, like Thessaly, despite their potential, are struggling to maintain a piece of the pie.

Through this study is attempted, two hot issues, such as social media and tourism, to be approached and to conclude in whether a digital investment for the region of Thessaly would be a valuable one. In order to answer that, relevant literature has been reviewed. The current situation has been described, involving the promotion of both Thessaly as destination and tourism-related enterprises using ICTs and social media. The factors affecting the effectiveness of the investment, like economic circumstances, the geography and culture of the region are also examined.

**Keywords** Tourism • Social media • Place marketing • Destination marketing • Thessaly • Greece

**JEL Classification** L83 • M31

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## 1 Introduction

The internet is reasonably considered as one of the most important innovations of all time. That is because of the tremendous impact it proved to have not only to business and particular undertakings but also in human nature and everyday life. According to the latest data, internet penetration over the world's population is 42 %, with the greatest penetration rates appearing in North America, Australia and Europe (Internetworldstats.com, 2014). According to the same source, by the end of 2013 internet penetration reached 59.9 % in Greece. That makes Greece the fourth country in European Union with the lowest penetration percentage, after Romania, Bulgaria and Italy.

Several studies so far, have examined in detail the impact of internet and information and communication technologies (ICTs) over tourism and the corresponding industry. Through the analysis of different aspects with a variety of methods, most of them conclude on a reshaping of the travel industry as a whole that has already occurred.

The application of ICTs on the tourism industry, called e-tourism by Buhalis and Jun (2011) raised quickly awareness of the scientific community. More important, Web 2.0 became a hot issue over the past few years. According to Turban et al. (2008), the term represents “the second generation of internet-based services that let people collaborate and share information online in perceived new ways”. Some of the most important Web 2.0 tools include RSS (Really Simple Syndication), podcasting, vodcasting, widgets, facilities to share, tag and classify information, mashup, data embedding systems and webcast (Haro de Rosario, Gálvez Rodríguez, & Caba Pérez, 2013; Bizirgianni and Dionysopoulou, 2013).

The vast majority of the tools above appear to be present in most social media. Social media on the other hand are found to be defined in many ways. However, the common denominator of the definitions given is that they refer to platforms friendly for the public to use in order to share all kinds of data and information and encourage interaction. Social media include blogs, wikis, media sharing platforms like Youtube and Slideshare, social networks like Facebook and LinkedIn and Twitter, which actually consists a category by itself (Haro de Rosario et al., 2013; Leung, Law, Van Hoof, & Buhalis, 2013).

Tourism industry's highly service-based nature is the reason why the applicability of Web 2.0 is so wide. Travel plans, destinations, hotels, tourist guides, restaurants, sights and events transform into experiences, which can be shared via text, photos and videos. More important, all of the above have the power and attraction to become popular issues of discussion over social networks (Miguéns, Baggio, & Costa, 2008).

Of course, it didn't take much time until the opportunity given to be exploited by marketing specialists. Marketing practices in tourism and hospitality are strongly correlated with social media and emerging technologies (Iancu, Popescu, Popescu, & Vasile, 2013; Buhalis and Deimezi, 2004), since organized crowds are there easy

to be found and targeted. However, what seems to attract more attention lately is the rising power of users in social media campaigns (Ketter & Avraham, 2012).

## 2 Literature Review

While the linear model of communication in place marketing campaigns starts to become outdated, a many-to-many communication model has already been formed (Zouganeli, Trihas, & Antonaki, 2011). The linear model of communication has three core components: the source, the message and the receiver. Those are characterized by a quite simple, one-way interconnection. So, the source, which is either a tourism business or a government tourism related unit, delivers the message, which is actually its selling proposition, to the receiver, the customer to be. Or at least that was the traditional process to market a place, as a tourism destination, which is true that has degraded due to the appearance and clear domination of social media (Ketter & Avraham, 2012).

The many-to-many model of communication previously mentioned refers to the ability given by social media to each user to interact one another, by sharing experiences via text, photos and videos. As a result, users transform from passive recipients to active sources of information. The interesting part of the story though is that information shared by consumers, is perceived in the minds of other potential consumers as real and the whole process is characterized by transparency (Haro de Rosario et al., 2013; Treer 2010).

The basic principal that actually defines the many-to-many model of communication is the one of User Generated Content (UGC). As explained by O'Reilly (2005), the term refers to the ability of users not only to produce their own content but also to consume content that other users have created. The bidirectional nature of the model under discussion can be clearly understood when referring to the most popular UGC application, Tripadvisor. Tripadvisor is "a website based on the idea that travelers rely on other travelers' reviews to plan their trips, or at least can be satisfactorily helped in their decisions by them" (Miguens, Baggio, & Costa, 2008). More specific, Tripadvisor attempts to organize the so-called electronic Word-of-Mouth (e-WOM), which is also generated on Twitter (Sotiriadis & van Zyl, 2013), in a user friendly platform.

Considering all the above, the tremendous change in the tourism and hospitality arena is a solid phenomenon that needs to be addressed by enterprises in the sector through the adoption of social media in their business strategies (Gretzel, Sigala, & Christou, 2012). Highlighting everything presented until that point, it has been reported that trust in a social media brand is strongly engaged with brand loyalty (Christou, 2015) the endlessly pursuing aspect of all marketers.

As far as the extent of the exploitation of social media concerns, research shows that tourism related enterprises and corresponding governmental units do not take full advantage of its capabilities (Sigala et al. 2012). More specific, Haro de Rosario et al. (2013) results indicate limited development of social media and web 2.0 tools

in top hotel chains. Most of them struggled to assure visibility, by creating a Facebook page or opening a Twitter account but didn't take it one step further and failed to build trust and credibility. That happened since, even though people did criticize the hotels and the services offered, there was no one there to reply and present the administration's point of view (Buhalis & Mamalakis, 2015).

Regarding European National Organizations (NTOs) and the way they use Facebook as a representative social media example, Zouganeli et al. (2011) noticed that only a little more than half of them had created a Facebook page by the time the study took place. Also, those who did, did not fully employed their potential under a structured social media campaign. As expected, the limited interaction with the public minimized the number of fans of the page and again failed to serve the reason of its existence (Dionysopoulou and Mylonakis, 2013).

In general, communication strategies involving social media are relatively inexpensive and time-effective as marketing efforts, while the interaction enables useful feedback to reach the business (Ketter & Avraham, 2012). Additionally, Sigala (2011) underlines the vulnerability of tourism as an industry and suggests extended but careful use of social media in crisis management.

A study conducted by Roy, Maxwell, and Carson (2014), monitoring the behaviors related to the subject examined of four small-medium enterprises in central Arkansas concludes that the four main aspects that influence social media usage are ease of use, affordability and availability of time to implement or technical support. It is also underlined the preference of those hospitality and tourism-related SMEs to social media that are already familiar to the public (Scott and Orlikowski, 2010).

### 3 Methodology

The main aim of the study is to decide whether a digital investment concerning social media in tourism sector would be applicable, suitable and useful for Thessaly, a region located in Central Greece. In order to reach a decision, tourism as an industry and the Greek tourism product are examined. Special attention is given to the fluctuation of numbers related to the attractiveness of the country's tourism product and destinations. The impact of the economic crisis is also highlighted. A thorough analysis is conducted concerning Thessaly's special characteristics, geographic and cultural, followed by comparative measurements associated with the value the region adds to the overall Greek tourism selling proposition.

The main part of the study focuses on how the National Tourism Organization, the Ministry of Tourism, the prefecture of Thessaly and tourism-related enterprises of the region use social media. The extent of usage and promotion is measured through data collected from Tripadvisor, Facebook and official national tourism websites.

The information extracted through the analysis is combined with knowledge gained after careful examination of studies focusing on the communication strategies formed mostly from government agencies in order to boost Thessaly's tourism



potential. Last are discussed the political, economical, social and technological circumstances in Greece, that could affect the undertaking.

After considering the above mentioned information, the study concludes in a proposition over the strategy that needs to be embedded, the possible barriers towards its accomplishment and the areas that should be further clarified before taking action.

## 4 Results

Greece is one of the most popular destinations in the Mediterranean, while tourism is considered in general a major financial activity. According to the Greek Tourism Confederation, Greek Tourism contributed in 2012 to the country's GPA about 16.4 %. Its contribution to employment was accounted for 18.3 %. More specific, the International Tourism Receipts, the same year, reached 10 billion Euros.

Due to the socioeconomic and political crisis Greece has undergone since 2009, Greek tourism was characterized by a general contraction in terms of both arrivals and receipts. However, corresponding data from the last 2 years show a clear tendency for the numbers to be restored (Hellenic Statistical Authority, 2014). Based on that fact, it is believed that tourism might be the driving force behind the country's economic recovery (Kapiki, 2012).

As far as setting policies concerns, the authority in charge is, as expected the Ministry of Tourism. Supervised by the Ministry of Tourism, the Greek National Tourism Organization is basically responsible in taking theory into action or simply applying the policies set by the government. Of course, everything mentioned above, is surrounded by a European framework that basically allows interaction and encourages consumption of the within EU borders tourism product.

Acknowledging though the great effect a successful regional policy might have in boosting local tourism, regions' and prefectures' authorities do try to form specialized policies for the corresponding areas they serve. It is attempted for these policies to be custom-made and as a result, to rely on the specific and unique characteristics of the region.

Among Greece's competitive advantages are its rich cultural legacy, natural beauty and geographic diversity (Investingreece.gov.gr, 2015). However, what need to be considered are the not so favorable aspects of Greek tourism. The geography of Greek tourism is one of those. It refers to the dissimilar distribution of tourists' visits. In particular, tourists prefer to visit coastal areas and islands. The fact of their concentration in such geographic regions can be explained through the establishment of Greece over the years as a destination, where visitors can enjoy sun and sea.

Narrowing the selling proposition of the country in that diptych is actually the reason why tourism appears to have intense seasonality. The tourism product selected to be the flagship of Greek tourism can be offered only during the summer.

Obviously, that fact generates a series of issues along with little exploitation of the already existing infrastructure and increased cost of use (Polyzos & Saratsis, 2013).

Thessaly is a region located in Central Greece. It consists of four prefectures: Larissa, Magnesia, Trikala and Karditsa. Thessaly actually covers an area of about 14.000 km<sup>3</sup> and given the last census that took place in 2011, 732.762 people live there (Statistics.gr, 2011).

Considering the diversity of geomorphology in Greece that changes even within relatively narrow areas, the four counties mentioned above appear to have different characteristics based on their location. Larissa occupies the northern part of the region, while Magnesia the southeastern one. Both of them do have coastal areas, while Sporades islands (Skiathos, Skopelos and Alonissos) are considered a part of Magnesia. On the other hand, Trikala, located on the western part of the region and Karditsa, on the southwestern one are both landlocked.

The city of Larissa is the capital of Thessaly and as such, it represents the financial, administrative, religious and scientific center of the region. As far as the ground of the prefecture concerns, it is 48 % flat, 25 % semi-mountainous and 27 % mountainous. Mountains (Mount Olympus), along with rivers (Pineios) and lakes are present to Larissa's natural landscape. The rich history of the prefecture is delivered through its religious and archaeological monuments and museums. Additionally, ski resorts and mountain trails already mapped do give an extra motive for tourists to visit Larissa even in winter (Lartourism.thessaly.gov.gr, 2015).

Magnesia "combines the green mountain landscape with the deep blue of the Aegean sea". More specific, Mount Pilion is quite famous not only from a natural beauty point of view but also due to the architecture of the local mansions. The three islands of the Northern Sporades are differentiated one from the other. Skiathos is characterized as the cosmopolitan island, while Skopelos is the more traditional one. On the other hand, Alonissos is the ecological island. At last, Volos, the capital of the prefecture, is supported by rich mythological background but also captures the visitor due to its unique dynamics and modern essence (Magnesia-tourism.gr, 2015).

The prefecture of Trikala is quite distinctive as a destination due to its natural beauty. Chaliki mountain, Aspropotamos river, along with lake Verlinga compose the basic landscape. However, religious attractions such as the monasteries of Meteora and the overall Kalampaka area, is what is even more distinctive about it (Meteorabooking.gr, 2015).

As far as nature concerns, the prefecture of Karditsa is quite similar with the one of Trikala, with the religious aspect not so clearly outlined. Instead, there are several activities for tourists basically around Lake Plastira. Getting in touch with local tradition is also quite easy through following routes set from village to village (*Karditsa—Tourist Guide*, n.d.).

Besides the natural resources already mentioned, Thessaly possesses 19 caves and 9 medicinal spas that can be exploited for tourism purposes. In addition, across the whole region there are several areas that have been characterized over the years as areas with special ecological and aesthetic value. Both of them are protected through presidential decrees, ministerial decisions or European and international

agreements, like NATURA 2000, CORINE and UNESCO sites (Department for Development Programming of Thessaly Region, 2011).

Given the above and several studies examining the capacity of the region for sustainable tourism development, Thessaly can be competitive in the global tourism market. However, what needs to be taken into consideration is the different degree of exploitation of the capabilities different geographic areas possess (Ministry of Development, 2003).

According to data released by the Hellenic Chamber of Hotels (Border Research and Research of the Regional Allocation of the Annual Tourist Spending, 2013), Thessaly ranks eighth in both number of incoming visitors and number of overnights, out of the 13 Greek regions. In terms of tourist spending, Thessaly comes ninth. However, when transforming the above in spending per overnight or spending per visitor, Thessaly falls in the eleventh and twelfth position, respectively. As expected, most tourists spending per overnight is observed in the islands of the South Aegean, in Crete, Attica and the islands of the North Aegean. All other regions' rates are below the country's average. Judging by the above data, Thessaly is not such an attractive destination by tourists' perspective, no matter its potential. As a result, tourism does not contribute to the region's economy as much as it does in other more popular regions.

When correlating the number of tourist spending per region and the origin of tourists, it turns out that tourists from Europe do spend more money when having their vacations in Thessaly. Between them, Italian tourists spend more, while German and French follow. Though, it is important to mention that there is no data concerning British tourists' spending. Information like those is crucial, since it is easier to identify the most profitable markets to promote the destination in question.

Interesting information is also given by the percentage distribution of tourist spending per region per sector. In descending order, tourist spending in Thessaly is distributed along accommodation, transports, shopping, restaurants and cafes and entertainment. Comparing Thessaly with the other 12 regions, it reveals that tourists in Thessaly do spend more than those in the remaining ten.

Over the past decade Greek tourism-related authorities, especially the Greek National Tourism Organization, have recognized the importance of promoting Greece as a destination through social media. More specific, since 2010, when the corresponding strategy was approved and applied in a 3 year basis, it was clearly stated in several reports that more than 80 % of the global community uses internet to decide and plan vacations. Social media enhance the experience, while they play a major role in cultivating emotions of content before, during and after the trip is taken. Furthermore, in order for the two core tourist audiences to be approached, British and Germans, those channels need to be exploited to the fullest (*Promotion Strategy from the Greek National Tourism Organization for the years 2014-2015-2016*, 2013).

Besides the Greek National Tourism Organization's website, which was redesigned in 2012 but is strictly informational and supervised by the corresponding

Ministry, in 2014 the campaign “Greece: All time classic” was launched. As a result, two new websites were created: “Visit Greece” and “Discover Greece”.

“Visit Greece” website (Visit Greece, 2015) aims to answer potential tourists why to choose Greece as a destination to spend their vacations. Though it is supported by only two languages, Greek and English, it has a modern design and is linked with several social media platforms: Facebook, Twitter, Instagram, Flickr, Foursquare, Pinterest, Google plus and Youtube. Most of the information found there is also shared to the corresponding blog. Of course, the website visitor has the opportunity to contact the administrators via email.

“Discover Greece” website (Discover Greece, 2015) is an even more useful and attractive tool in the hands of the potential tourists. Not only it provides information about the destination, but also through its contemporary design, helps the visitor to be, to plan the trip to Greece. The website is an initiative of the NGO “Marketing Greece”, which only purpose is to promote the Greek tourism product. The website is supported in five languages, Greek, English, German, French and Russian. As expected, it is linked with Facebook, Twitter, Youtube, Google plus, Pinterest and Instagram. What is distinctive about it is the opportunity given to the visitors to create the so-called “lovelist”. Lovelist is a tool embedded into the website and practically aims to bond the potential tourist with Greece as a destination. Additionally, instead of simply contact the administrators, the website encourages its visitors to both share their opinion and send a query if needed. As in the case of “Visit Greece” website, this one too appears to have a blog that enables people to publish their own stories.

As proposed above, the extent in which tourism contributes to the economy of the region of Thessaly is not the desirable one. In order for Thessaly’s potential to be exploited to the fullest, several plans have been published through the years. A recent report on the matter (Choustis, 2013) suggests the promotion of the local tourism product through the adoption of ICTs, among other equally important lines of action.

The current situation is far away from the one proposed. More specific, not even all prefectures of Thessaly have official websites supervised by the decentralized administration authorities dedicated to the areas’ tourism product. Potential visitors of Karditsa can be informed about the destination only through an electronic brochure. That is not the case for the other three prefectures. Larissa’s website is supported in four languages, Greek, English, German and French, Magnesia’s in three, Greek, English and German, and Trikala’s in only two, Greek and English. The visitor is given the opportunity to contact the administrator in all three websites via e-mail, but only the one of Trikala allows website content to be shared in social media with just a click. However, in all cases there is no official presence and promotion in social media.

An indication of the perception of the public and the popularity of the prefectures’ capitals can be given by viewing the activity of those places on Facebook (Table 1). Both measures examined, “likes” and visits, agree that Volos is the most popular city in Thessaly. Considering however that the numbers mentioned are a result of both tourists’ and locals’ activity, they can be also used as a measure of

**Table 1** Facebook activity of Thessaly’s largest cities

Facebook places	Likes	Visits
Volos	34.873	217.917
Larissa	29.645	186.427
Trikala	19.840	131.583
Karditsa	16.701	70.934

**Table 2** Thessaly’s activity on Tripadvisor

Category	Number of reviews and opinions
Hotels	11.280
Vacation rentals	218
Attractions	3.379
Restaurants	5.127
Forum	515
Total	20.558
Candid traveler photos	293

how content people feel when sharing their presence in those places. It is important to note also that despite Volos has more residents, the city’s popularity is greater than the one of Larissa.

As far as the activity of Thessaly on Tripadvisor concerns, more than 20.000 reviews and opinions have already been written about it as a destination and about 300 candid traveler photos have been posted (Table 2). Out of those reviews, more than half concern the hotels of the region listed. At that point it is important to note that out of 733 hotels that appear in the search results of “Discover Greece” website available for booking, only 137 are present and reviewed on Tripadvisor. The number of reviews about the 276 vacation rentals listed is significantly lower. The remaining reviews refer to the 93 attractions and 386 restaurants of Thessaly. Another 515 posts can be found in the discussion forum.

Based on Tripadvisor’s rankings, Volos, the capital of Magnesia, is considered the most popular destination. That fact agrees with the conclusion drawn by the city’s activity on Facebook examined previously. Second ranks the village Chania, where the ski center is located and is obviously quite famous especially in winter. The third position in terms of popularity is taken by Kalambaka, the city near Meteora, which many people visit all over the year for religious purposes. The remaining three positions are captured by Larissa, Tsagkarada, which is also located in Magnesia, and Trikala.

Except the analysis of data extracted from Tripadvisor concerning Thessaly’s activity as reported in the platform, the region’s comparative performance should also be examined. For that purpose, not all Greece’s regions were chosen. Mainland regions, with or without coastal areas were selected. Attica and Central Macedonia though, were not included since there, are located the two main urban centers, Athens and Thessaloniki, respectively. As shown below (Table 3), Thessaly ranks third in terms of reviews, after Peloponnese and Epirus. Based on the available data, the under examination region ranks second concerning the candid traveler photos posted on Tripadvisor.

**Table 3** Activity on Tripadvisor per region

Region	Reviews and opinions	Candid traveler photos
East Macedonia and Thrace	5.223	17
West Macedonia	3.504	No data
Epirus	26.235	168
Thessaly	20.558	293
Central Greece	17.423	111
West Greece	14.774	No data
Peloponnesse	52.443	371

Judging by the information presented above, Thessaly's activity as a destination compared with other regions on social media is quite high. It seems that visitors are eager to share their experiences in Thessaly on platforms like Tripadvisor and are attracted by its natural beauty, in such extent that a need emerges to capture the moment via camera lenses.

## 5 Conclusion

When examining a potential digital investment in any given sector, one of the first aspects that need to be considered is whether the attempt will reach the desirable audience. In the case discussed, despite the low internet penetration in Greece, the one of the target audiences, mostly developed European countries, is impressively high. In combination with the widespread phenomenon of social media interaction, it appears that the first precondition is met.

The reshaping of the travel industry has already taken place. As a result, an adjustment of both the authorities and the enterprises to the existing circumstances is mandatory. More specific, obsolete models of communication should be abandoned and replaced by new ones. The extent of the need of change in marketing and communication models is quite similar with the one of enriching the Greek tourism product with alternative tourism forms. As the informational model weakens, stimulus should be given for experience exchange. After all, demand does not only refer to the service during the trip, but expands in both periods before and after it.

For the benefits of a digital investment to be maximized, collaboration between interested parties is crucial. Moreover, authorities and enterprises should be aligned as far as the marketing strategy concerns. In order for such a relation to be formed, authorities need to be respected and productive, while enterprises should be reliable and cooperative.

The electronic Word-of-Mouth may have both positive and negative consequences for an enterprise or a destination. However, negative ones can be minimized when being ready to face them, while positive ones, if exploited properly, can trigger a chain reaction effect. It is true, that tourists will share their travel

experiences online anyway, and either authorities or enterprises are present or not. When present though and having a quick and responsible response, there is no case of loss, only gain.

Just presence in social media platforms does not guarantee a beneficial overcome. What needs to be assured is enduring and methodical engagement. It is all about an endless pursuit of earning good critics and bending the bad ones. That is why structured social media campaigns basically orchestrated by NTOs are suggested. Among their essential characteristics belong the ability to manage a crisis and to give incentives not only to tourist but also to locals, to embrace the undertaking. As far as small-medium enterprises concerns, where ease of use, affordability, availability of time and technical support are the criteria in choosing in which medium to be promoted, it would be wise to concentrate on one or two social media platforms for promotion.

In addition to the facts presented above, the political, economical, social and technological circumstances in Greece favor a digital investment in the tourism sector. Political and economical instability pushes government to adopt cost-effective solutions in sectors able to show results relatively quickly and drive Greece towards development. On the other hand, due to their reduced income, most people spend much more time at home surfing on the internet and pursuing contact through social media. Of course, smartphones, 3G and 4G technologies and VDSL internet that became exceptionally famous the last few years, made remote contact extremely easier.

Thessaly's great tourism potential is ready to be exploited. A digital investment might lead the region to transform into an attractive destination. Inevitably, tourism would contribute even more to the region's economy. In order for this to happen, authorities' and enterprises' attempts should be coordinated. Passing from theory to application though, will highlight the importance of properly educated personnel to manage the campaign. Last, employees in the tourism sector should understand and value the investment in order to promote and support it.

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# Assessing the Value of Hotel Online Reviews to Consumers

Sofia Reino and Maria Rita Massaro

**Abstract** Previous research studied the impact of travel online reviews. However, this is quantitative and lacks of conceptual frameworks to ensure consistency. Only a few of these have considered influencing variables (i.e. characteristics of the review and the reader, and surrounding circumstances). Some of their findings are conflicting, which could relate to the lacking of a consistent approach. This study will only focus on online reviews about accommodation establishments. Its aim is to gain an understanding of the value of accommodation online reviews, through a qualitative study. A conceptual framework, based on consumer-perceived value theory, has been developed and face-to-face interviews with accommodation online review readers have been undertaken. The results suggest that the value of reviews is primary epistemic and partially functional, but limited emotional and social value has been reported. Furthermore, the elements eliciting the different value dimensions and additional variables influencing on their value (such as information search patterns) are identified.

**Keywords** Online reviews • Accommodation and ICT • eTourism • Consumer-perceived value

**JEL Classification** M39

## 1 Introduction

Extant research suggests that social media (social networking sites, consumer review sites, content community sites, wikis, Internet forums and location-based social media) makes an important contribution in tourism, in terms of promotion and supporting tourists' decision-making. This has particularly been the case of studies on online reviews, like those provided through travel-related websites such as Trip Advisor, Booking.com, Trivago.com (Fotis, Buhalis, & Rossides, 2012; Gretzel & Yoo, 2008; Vermeulen & Seegers, 2009). The online review service

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provided through these websites aims at supporting travellers in choosing their destination/hotel/other travel services (Dwivedi, Shibu, & Venkatesh, 2007; Hudson & Thal, 2013). According to Bray, Schetzina, and Steinbrick (2006), Femback and Thomson (1995), Wang, Yu, and Fesenmaier (2002), and Yoo, Lee, Gretzel, and Fesenmaier (2009), travel online reviews are perceived as similar to the recommendations provided by friends and relatives, and it is a more trusted source of information than the official one. Furthermore, Gretzel, Fesenmaier, and O'Leary (2006), and Wang et al. (2002) suggest that the reason for this impact is that social media decreases uncertainty, and it provides a sense of belonging into virtual travel communities.

However, findings about the impact of online reviews are not conclusive. Additional research has suggested that this influence may be limited. This is the case of the work undertaken by Conrad Advertising in association with YouGov (Conrad Advertising & YoGov, 2011). Their study suggests that most of the time, negative reviews do not stop those reading them from booking a service. Similarly, Ayeh, Leung, Au, and Law (2012), argue that most Internet users do not access online reviews when planning their trips. So what's the reason behind these different results?

The reality is that most research suggesting the impact of online reviews has focused mainly on consumer decision-making and has been quantitative (i.e. Fotis et al., 2012; Gretzel & Yoo, 2008; Vermeulen & Seegers, 2009). Yes, it's true that quantitative research is strong in terms of reliability and validity. Nevertheless, they hold the danger of decontextualizing the phenomenon under study by removing the event from its real world setting, and ignoring the effects of variables that may have not been included in the model (Webb & Auriacombe, 2006). Hence, as argued by Ayeh et al. (2012), little is known about what makes online reviews relevant to consumers. And research understanding the emotional and behavioural responses at a deep level, helping marketers to understand exactly how, when and where social media influences consumers, is lacking (Hudson & Thal, 2013). Consequently, this study seeks to address that gap, and to gain an understanding of the real value of online reviews to those reading them.

Yet it's true that online travel reviews may relate to destinations, accommodations and a wide number of travel-related elements, however this study will only focus on accommodation online reviews. This is because of the limited resources available to undertake the study. Further development of the work would focus on additional elements. Hence, the aim of this study is that one of obtaining an understanding of the value of accommodation online reviews. However, it should not be confused with those studies focusing on the impact of reviews. As opposed to those studies mainly focused on functional aspects of the reviews (e.g. their impact on decision-making), this one adopts a comprehensive, multidimensional approach to assess consumer value. The literature review will develop a conceptual framework for this concept of consumer value, and it will also examine those studies focused on the impact and use of online reviews. Although these adopt a different approach, they can also enrich the discussion.

## 2 Literature Review

### 2.1 *Impact and Use of Online Reviews*

As explained through the introduction section, there are different views on the level and type of impact of online reviews on traveller's decision making.

An extensive number of studies have identified benefits of travel online reviews for potential travellers looking for information. Online reviews have been reported to decrease uncertainty (Gretzel et al., 2006; Wang et al., 2002); to act as a source of inspiration (Fotis et al., 2012); to provide information about destinations and products that helps travellers evaluating alternatives; to increase travellers' confidence during decision making, to reduce risk and to assist them in selecting accommodation (Gretzel, Yoo, & Purifoy, 2007), and to help avoiding places/services that would not be enjoyed (Gretzel & Yoo, 2008).

However, most of these studies generalise about these benefits and tend to ignore differences among the reviews. Yes, it's true that some studies look at some types of variations. For example, Gretzel et al. (2007) and Gretzel & Yoo (2008) look at the influence of meta-communication (e.g. cosmetic factors that make reviews more trustworthy, such as the tone of the review, a balance of pros/cons, the characteristics of the reviewers etc.); the types of travel services which seem to be influenced (i.e. activities, restaurants and accommodation) and those that don't (i.e. choices about the destination, the timing of the trip, and en route travel planning); and the influence of age and gender on the use of reviews. Related to this is the work by Rodríguez del Bosque, Héctor San Martín, Collado, and del Mar García de los Salmones (2009) who argues that age also influences on the credibility attributed to online reviews, with younger generations trusting reviews more than older generations. Additionally, Court et al. (2009) identify different stages in travel decision-making process (i.e. consider; evaluate; buy; enjoy; advocate; and bond) and they suggest that social media specially influences on the evaluate and advocate stages.

Other factors that have been considered relate to the type of trip, and whether it is a repeat destination. For example, Verma, Stock, and McCarthy (2012) suggested differences in online behaviour between those travelling for business and leisure. According to their study those travelling for business tend to follow the recommendations given by their company when choosing a hotel. However, when it comes to leisure trips, consumers tend to rely more on personal recommendations, which are then also followed by search engines and online travel agencies. And Simms (2012) suggest that those visiting a destination for the first time will look at online reviews, but not those visiting for a repeat. Also the place where it is written seems to have an important influence. The work by Burgess, Sellitto, Cox, and Bultjens (2011) suggests that the place where the reviews are located will determine how much they are trusted. Reviews are trusted more when they are placed in travel specific websites more than when they are located in generic social networks websites. Additionally, the information provided by travel agents, commercial operators and comments by travellers on third party websites were trusted. But

the highest level of trust was placed on that information provided through State government tourism websites. However, consumers were not sure about trusting comments placed on their own blogs, as well as on generic social networking sites. Related to this is the work by Mack, Blose, and Pan (2008) in Fotis et al. (2012), who suggests that traditional WOM is more trustworthy than blog posts. This may be because in WOM travellers have strong social ties.

However, there are other factors to which no attention has been paid. This is the case of the elements about the hotel/destination or other service that users actively look for; the criteria that they apply when selecting reviews; the impact of the different patterns of information search; and the influence of other elements such as for example the type of accommodation. Furthermore, some of the aspects that have been studied show no conclusive results. For example, Cox et al. (2009) in Fotis et al. (2012) identify the stage of the trip in which online reviews are mainly used. According to their work, their use prior to the trip is very common, and they are hardly used during and after the trip. Contrary, Fotis et al. (2012) undertook an online survey across holiday's makers from the Former Soviet Union Republics, including Russia and suggested that after the trip is the most common time when social media is used, and the reason for this is because it used to share experiences and photos.

Contradicting results are also those related to trust. A number of authors have suggested that that online reviews provide information valued to a similar degree of that one provided by friends and relatives and more trusted source of information than the official one (Bray et al., 2006; Femback & Thomson, 1995; Wang et al., 2002; Yoo et al., 2009). However, Cox et al. (2009) in Fotis et al. (2012) suggest that social media were perceived as less trustworthy than traditional sources of information (e.g. official tourism websites and travel agents). However, the sample relates to mailing list of an official tourism website which may have skewed the results. And there are also conflicting results between the work by Vermeulen and Seegers (2009) and by Gretzel et al. (2007). The former suggests that the reviewers' expertise does not influence on the impact of reviews. However, the work by Gretzel et al. (2007) suggests that the characteristics of the reviewer (such as the tone of the review, a balance of pros/cons, the characteristics of the reviewers, such as whether they have experience travelling or not, etc.) do have an impact on the extent to which their comments are considered.

Other aspects that have been quite neglected are those related to the customer experience, both in terms of its hedonic role and making them feel part of the literature. Gretzel and Yoo (2008) suggest that online reviews are perceived as enjoyable but no explanation of the reasons behind this enjoyment, and the aspects that make it enjoyable has been provided. And one of the few studies that suggests this issue of a sense of belonging is Gretzel et al. (2006), arguing that social media provides a sense of belonging into virtual travel communities. However, to the knowledge of the researchers, no empirical result has confirmed these suggestions.

In addition, there are also some studies which actually challenge the overall suggestion that online reviews have such an influence on the decision making of potential travellers. Ayeh et al. (2012) suggest that most Internet users do not access

online reviews when planning their trips and that little is known about what makes online reviews relevant to consumers. And this the work by Conrad Advertising (2011) in association with YouGov, suggests that the influence of online media on travellers' decision may just be limited. Thus, this section of the literature review has supported the identification of a number of gaps in the literature with regards to providing an understanding of what is the real value of accommodation online reviews to potential travellers. These gaps relate to the limited number of studies exploring factors influencing this value, their frequently inconsistent results and the overall lack of a comprehensive and consistent approach for its study. Therefore, the following section will be directed to the identification of a conceptual framework supporting the comprehensive study of the consumer value of accommodation online reviews.

## ***2.2 The Consumer Perceived Value: A Framework***

In order to understand what makes the online reviews relevant to the consumers, the 'perceived value' comes as a key concept. Traditionally, the concept of 'value' has been intended as equivalent of price and monetary value, but from a marketing and consumer perspective, the value is seen as a trade-off between price and quality which relies more on customers' perceptions of the product than on its objective characteristics. However, this definition works well when applied to the tangible products, but when it comes to intangible products and services, more socio-psychological and contextual factors should be taken into consideration (Williams & Soutar, 2000). In fact, during the time, the one-dimensional definition of the 'consumer perceived value' has been replaced by multidimensional conceptualizations (Sánchez-Fernández & Iniesta-Bonillo, 2007). The 'perceived value' construct—beside the objective product related components, such as price and product attributes (Tellis & Gaeth, 1990)—included more subjective and evaluative consumer dimensions: the consumer's personal benefits (Zeithaml, 1998), the personal expectations and desires (Spreng, Dixon, & Olshavsky, 1993) the shopping experience (Kerin, Jain, & Howard, 1992), the corporate image (Andreassen & Lindestad, 1998), the context (Bolton & Drew, 1991), the conative variables—as the repurchase intention or search for alternative—(Desarbo, Jedidi, & Sinha, 2001), the consumer's values (Holbrook, 1999), the value of the relationship between seller and buyer (Lindgreen & Wynstra, 2005).

Accommodation online reviews are essentially contents, written from previous travellers and less or more organized by a website provider. By reading reviews the majority of the generated value is in the cognitive, mental process of the final reader: the value is strictly concerned with the internal system that individuals use to value items (Holbrook, 1999). Thus, a multidimensional construct of consumer perceived value seems to be the most suitable framework to assess what makes the online reviews relevant to consumers. In order to structure the interview and the key

source of perceived value of the accommodation online reviews Sheth, Newman, and Gross (1991) framework has been adopted.

The consumption theory (Sheth et al., 1991) claims that the value for the consumers stems from five different aspects of the consumption: epistemic value, functional value, emotional value, social value and conditional value.

The epistemic value originates from the satisfaction of the consumer's desire of knowledge and curiosity. This dimension is a relevant source of value for online reviews due to their informative nature; the epistemic value was considered as the main source of consumer perceived value and a key dimension to explore.

The functional value of the product or service is generated from the accomplishment of its function, the fulfilment of its purpose. In measuring this value, Sweeney and Soutar (2001) split it in two parts: a. the 'value-for-price' that is a comparison between perceived quality and price; b. the 'performance/quality' that is the utility derived from the perceived quality and the performance of the product. Since the online reviews are provided free of monetary disbursement, the price of the accommodation online reviews is here intended as the effort in terms of energies and time that the travellers spend in researching information through online reviews. Thus, the performance of online review was operationalized as its effectiveness in providing crucial, truthful and reliable information which turned the experience of accommodation into a positive overnight to the travellers.

The emotional value is related to the feeling that the consumption generates, it represents the hedonistic part of the purchase (Sheth et al., 1991) and includes the play or fun gained from it (Holbrook, 1994). While the social value represents the perceived utility stemming from an alternative's association with one or more specific social groups (Sheth et al., 1991). Its definition has successively been broadened to include the symbolic social meaning of the consumption (Sweeney, Soutar, Whiteley, & Johnson, 1996). It has been suggested that the social media, and thus the online reviews, provides a sense of belonging into virtual travel community (Gretzel et al., 2006), hence the social value for online reviews is operationalized as the creation of linkages with other members of the community and, with its ability to facilitate the identification with specific groups of travellers with common interests.

Finally, Sheth et al. (1991) defined the conditional value like the perceived utility acquired as the result of a specific set of circumstances facing the choice maker (Sheth et al., 1991). The reviews value can change in a different set of circumstances: researchers suggested that travellers, according to their trip purpose (Verma et al. 2012 in Fotis et al. 2012) or its repeated/new nature (Simms, 2012) trust different sources of recommendations. For our research, the conditional value of the accommodation online reviews was taken into consideration by asking interviewees to describe the characteristics of trip (i.e. purpose, length, travelling alone/in company, etc.) for which they have been looking through the online reviews.

### 3 Methodology

The aim of the study is to assess the value of accommodation online reviews to consumers. In order to achieve it, the following objectives have been set up:

1. To obtain an understanding of the extent and type of influence that accommodation online review sites have on customers' choice.
2. To identify common and individual patterns of use of accommodation online reviews.

In order to address the stated objectives, a semi structured in-deep interview was designed for assessing the traveller perceived value of the accommodation online reviews. Consistently with the explorative nature of this work, the interview was structured in five sections reflecting the framework presented above. Each section covering a specific value dimension—epistemic, functional, emotional, social, and conditional—included a set of open ended questions for stimulating the interviewees in talking freely about the topic and, for obtaining information on the interviewee's cognitive and decisional process. Ten semi-structured in-deep interviews were undertaken in August 2014. Each interview lasted around an hour, and they took place in various locations of the UK and Italy. A convenience sampling was adopted to recruit participants, based on their availability and their reported experience with the use of accommodation online reviews. The sample achieved representation of four nationalities, including Italian, Spanish, Irish and British, to avoid potential cross-national differences. However, it should be noted that most participants were female (nine females and one male). Furthermore, ages varied between 28 and 47 years old only. These limitations will be considered throughout the discussion.

### 4 Results

Results are presented by discussing individually four out of five value dimensions: epistemic, functional, emotional, social. The circumstantial factors (i.e. length of the trip, frequency, etc.) are illustrated at the beginning of this section and when significant are discussed along to other value dimensions.

Travel patterns varied across participants. Nearly half of the participants (four out of ten) only travelled twice per year, one three times, and the remaining travelled four times or more. The participant with the highest number of trips travelled ten times. When asked about their information search, participants were suggested to refer to one particular trip, and the results show certain variety with regards to the purpose of their selected trips. Eight of the participants focused on leisure trips, and the other two reflected on a mix of business and leisure travels. With regards to the type of accommodation in which they stayed, most of them (seven out of ten) reported about trips during which they stayed at hotels (this was



the case of seven participants), two of them referred to apartment stays, and one to a mix of hotels and hostels stay.

Participants reported on the epistemic value of the reviews, by suggesting on different types of knowledge that they acquire through online reviews. Some of these align with those suggested by extant studies. This is the case of their provision of information to decrease uncertainty (Gretzel et al., 2006 & Wang et al., 2002); to act as a source of inspiration (Fotis et al., 2012); to provide information about destinations and products that helps travellers evaluating alternatives; to increase travellers' confidence during decision making, to reduce risk and to assist them in selecting accommodation (Gretzel et al., 2007), and to help avoiding places/services that would not be enjoyed (Gretzel & Yoo, 2008). However, they also provide details about additional types of knowledge. The first one relates to the information which allows them to corroborate the data given by providers (especially with regards to aspects of quality); that one helping to adjust their expectations about establishments in that area and for that price (building them up or bring them down); and that one to complement their knowledge with information that does not normally appear on the accommodation's websites (e.g. the safety of the area where the establishment is located or noise).

Thus, as suggested by studies like Gretzel and Yoo (2008), Fotis et al. (2012), and Vermeulen and Seegers (2009) reviews seem to influence decision-making, and the influence of online reviews is perceived this at different stages as suggested by Court et al. (2009). However, while Court et al. (2009) suggested that social media specially influences on the evaluate and advocate stages, and the participants in this study reported on the influence of online reviews at the consideration (in terms of inspiration), evaluation and purchase stages only. Interestingly, participants reading reviews to support them at the consideration and evaluation stages select the reviews based on ratings (looking at the positive, at the negatives or a mix), and/or meta-communication aspects (i.e. tone, the formality of the message, tidiness, length, etc.). However, those participants reading reviews to support the purchase stage only will read all the reviews, the first few ones, the first page, or so on.

Getting into further detail, information regarding the specific aspects that participants look for when reading reviews, was collected. These related to cleanness, smell, the general state of the room, hot water, good shower pressure, service quality, noise, any refurbishment going on in the accommodation or around, WIFI's quality (specially when abroad), location, facilities in the area (i.e. restaurants, walking distance to attractions, taxis, etc.), whether it's fairly modern, staff friendliness, food quality, aesthetics, views, quality of breakfast or food, information for pet owners, convenience and level of comfort of the transport facilities located close by, security and safety. However, there are some variations based on the type of accommodation, travel budget, type of destination and travel party/type of trip. Furthermore, one participant (participant 2) suggested that when going on packaged holidays they do not read them. Only when booking individual holidays.

In terms of the influence of type of accommodation, participant 4 suggested that when renting privately owned apartments, a crucial element is to find out how easy it is to deal with the owner. However, this is not that important when looking for hotels. With regards to the impact of the destination, participant 3 suggested that when looking for a hotel in London, views are not that important. This is because London is lively destination where the key element is sightseeing and limited time is spent at the hotel. Furthermore, it is a very expensive city. Therefore, location and price become more important. In terms of the influence of the travel party, participant 4 suggested that noise may be a big issue for families, but it may be a positive aspect for those looking for a lively location, such as groups of young friends. An example of how the type of trip influences is that one provided by participant 5. This participant suggested that location is essential for her when travelling for business. However, when travelling for leisure, the aesthetics of the place become highly relevant.

Furthermore, participants reported on the different weight of elements. For example participant 7 suggested that tidiness, cleanliness and safety are the most important elements for her. But elements like kindness of staff are not the first priority. And even within cleanliness certain aspects acquire more importance than others. For example, participant 7 also suggested that she would not mind too much if there is some dust on the carpet, but “if someone says something about stains on bed sheets, towels or the bathroom I immediately remove the hotel from the shortlist”.

Evidence of the functional value of the reviews was also identified, both in terms of quality and time. With regards to quality, there is an indication that participants only see their needs met to a certain extent. Only four participant reported that their information needs were met. Quotes regarding this question were of the type such as “it is the only information that I can get other than that one provided by the hotel”. Therefore, it seems that it is the best possible solution, although not ideal. With regards to trust, participants also showed mixed views (only four out of ten trust them). Bray et al. (2006), Fedback & Thomson (1995), Wang et al., (2002), and Yoo et al. (2009) argued that UGC is perceived as similar to recommendations provided by friends and relatives, and it is a more trusted source of information than the official one. But according to this study, reviews are read because there is no other type of information available other than the official. Furthermore, there are big differences across websites, not only between the website of the provider and commercial online review sites, as suggested by Burgess et al. (2011) and between WOM websites and individual blogs, as Mack et al. (2008) in Fotis et al. (2012) argues, but also between commercial sites themselves. For example, participant 3 suggested that she does not trust Tripadvisor because she knows someone who writes fake reviews in Tripadvisor for a living. However, she does trust booking.com.

The data provides an interesting insight into the elements that influence the perception on the reviews. Some of these align with those suggested by Gretzel et al. (2007) and Gretzel and Yoo (2008), which looked at the influence of meta-communication. As suggested by these authors, and contrary to what Vermeulen

and Seegers (2009) suggest, one of these elements is the availability of information about the reviewer. Both participants 5 and 6 made emphasis on the importance of this element. Issues related to age and gender suggested by Gretzel et al. (2007), Gretzel and Yoo (2008) and Rodríguez del Bosque et al. (2009) could not be identified during the interviews due to the nature of the study (qualitative). But an additional element which had not been suggested by the literature relates to the nationality of the reviewer. Participants 7 suggested that they only trust reviews from reviewers of the same nationality on certain aspects. In the case of participant 7 (Italian) she suggested, with regards to comments about cleanliness, that “it is important that comments come from Italians, as I do not consider English criteria and judgements reliable on that”. And with regards to the functional value-time element, overall, reviews are not perceived as a waste of time. This is because people spend the time that they choose to spend. However, it should be noted that the time they spend widely varies, going from only spend 5 min (participant 7) up to 6 h (participant 2).

The views regarding the emotional value of reviews are also quite mixed. According to Gretzel and Yoo (2008) reading reviews has been reported as enjoyable. However, the results suggest that only six out of ten participants did enjoy the reviews. The other four didn't, but that they read them for practical reasons. Of those who did enjoy them they reported that they felt like gossiping (participant 1) and it helped them daydreaming about their trip (participant 9).

No evidence of sociable value of reviews was found. When asked, participants suggested that they did not feel part of a virtual community, which would contradict the suggestions made by Gretzel et al. (2006).

Finally, the results seem to indicate that consumers have developed skills to make reviews useful despite of their limitations. Reviews are examined with a critical eye, and customers are making their own judgements about giving them consideration. Ratings are not directly influencing on their decisions, however, they do influence at the “Information Search” stage.

To conclude, the results suggested that the value of reviews is primary epistemic and partially functional, but less emotional and social. In other words, travellers read reviews when booking accommodation, but they do it because this is the only way to access certain type of information other than the one given by the accommodation provider.

## 5 Conclusion

A significant number of studies have been directed to identify the impact that travel online reviews have on consumers. However, these mainly focus only on the activity of decision-making and they tend to be quantitative. One of the consequences of this is that they tend to adopt a one-dimensional approach, focused on the purchase decision-making process. Furthermore, they tend to ignore additional benefits/cost-effects that online reviews may have on consumers (e.g. fun, time,

etc.), and to consider all reviews equally important; only a few studies have been directed to understand the differences influencing on their impact and these have been identified in the literature review section (i.e. Burgess et al., 2011; Court et al., 2009; Cox et al. 2009 in Fotis et al. (2012); Gretzel et al., 2007; Gretzel & Yoo, 2008; Mack et al. 2008 in Fotis et al. (2012); Rodríguez del Bosque et al., 2009; Simms, 2012; Verma et al., 2012). However, some of these studies present contradictory results and/or neglect certain aspects, such as the influence of the content of reviews, or differences related to the information search patterns of consumers. While the authors acknowledge the importance of also other areas of travel, this study has only focused on accommodation online reviews. Hence, the aim of this study has been that one of obtaining an understanding of the value of accommodation online reviews, by undertaking a qualitative study and avoiding the limitations of quantitative research.

In addition to identifying the gap in the literature, the literature reviews section developed a conceptual framework of perceived consumer value. This is to ensure a consistent and comprehensive research approach for the study. The framework suggests that the consumer value of online reviews is made of four different components: epistemic, functional (both in terms of quality and time), emotional and social value. Ten one hour face-to-face interviews with users of online reviews were undertaken, and questions were directed to identify the elements that the generated epistemic, functional, emotional and social value of accommodation online reviews.

The results suggested that the value of reviews is primary epistemic and partially functional, but limited emotional value has been reported and the social value seemed inexistent. Travellers read reviews when booking accommodation, but they do it just because this is the only way to access certain type of information other than the one given by the accommodation provider, and those interviewed suggested that they do not feel part of an online community. Furthermore, the study also helped identifying the elements that elicit the different value dimensions.

Limitations related to the nature of the qualitative nature of the study (small sample, lacking representation of all demographic groups) should be taken into consideration. Further research, this time quantitative should continue this line of study. Despite these limitations, the implications of this study are important to the industry, because they help managers understanding the scope of influence of online reviews. Furthermore, it contributes to the advancement of knowledge in the topic of information search for travelling. This will support the customisation of information provided to customers, which given the constantly increasing array of travel-related information produced every day, is emerging as an essential area for development. Therefore, they are of important value to accommodation establishments' managers, but also to commercial websites with online reviewing functionalities, and to Reputation Management System providers.

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# A Cognitive Linguistic and Sentiment Analysis of Blogs: Monterosso 2011 Flooding

Raffaella Folgieri, Miriam Bait, and Jean Paul Medina Carrion

**Abstract** The aim of this study is to explore the use of web resources in order to trace the discursive strategies enacted to restore the image of a tourist destination. In particular, we analyze the case of Monterosso, damaged by a flood in 2011. The innovation of this paper consists in a twofold approach: a linguistic approach within the framework of Discourse Analysis, and a sentiment analysis approach realised through tools available on the Internet and specific procedures we have developed in the R environment.

The findings are interesting and encourage to refine our approach in the future.

**Keywords** Discourse Analysis • Cognitive linguistics • Artificial intelligence • Sentiment analysis

**JEL Classification** A13

## 1 Introduction

This study is part of an ongoing research project on tourism communication on the web. Specifically, it reports on an exploratory analysis of the communicative strategies displayed by blogs to restore the image of a top tourist destination of the Italian Riviera, Monterosso al Mare, where a serious flood took place on 25th October 2011.

The flood hit a wide coastal area from Liguria to Tuscany, but in particular the Cinque Terre, a UNESCO World Heritage site, and a National Park. Our study started on the discursive forms of (inter)action enacted to rebuild the image of a tourist destination collecting web texts taken from two websites maintained by the

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city council of Monterosso<sup>1</sup>, from online newspapers, and from blogs. We soon realized that blogs are more worthy of attention because of their paramount global potential as participatory communication tools and their interesting language traits. And not only, as we are going to see shortly.

The analysis performed in this study is based on a cognitive linguistic approach because we analyze not only texts, but their impact on readers' emotions and cognition mechanisms to evaluate their general involvement.

To complete our analysis, we used tools and methods from Artificial Intelligence and performed a sentiment analysis of the contents of the two selected websites, and of the general feelings generated on the web by the event, that were detected by users' tweets.

This paper is thus divided as follows: in paragraph two, we introduce the reasons why we decided to consider blogs our main starting point for the analysis. Then, we present the methodology adopted based on a cognitive linguistic approach. Results are then shown and discussed.

The third paragraph is devoted to the sentiment analysis. Here, we introduce an overview of this type of analysis and the general principles we have followed. Then we present the adopted tools and methods, and, at the end, we discuss the obtained results.

In the last paragraph, we trace some general conclusions on the basis of the two performed analyses.

## 2 The Cognitive Linguistic Approach

### 2.1 *Blogs: What and Why*

The starting point is, not surprisingly, the Internet, a virtual public sphere (Habermas, 2006), which provides a shared pool of key information and instructions about a place hit by a natural disaster, contributing therefore to constructing and reconstructing its image.

The blog seems to be the fastest growing computer-mediated communication genre. The three main constitutive features are the reverse chronology of its entries, the frequent updating and the combination of links with personal commentary (Herring et al., 2005: 1; Miller & Shepherd, 2004: 4). Scholars have long debated the origin of blogs. Some authors — mainly bloggers themselves — claim that the blog is an example of new web-native genres (Blood, 2000), just as social networks. Others, in line with Todorov who claimed that “a new genre is always a transformation of an earlier one” (1990: 15), recognize ‘antecedents’ and therefore talk about ‘genre migration’ of pre-existing genres, adapted to fully exploit the

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<sup>1</sup> <http://www.buongiornomonterosso.com>; <http://www.rebuildmonterosso.com> (accessed on 1/3/2015)



opportunities offered by the electronic/hypertextual format, or better a “remediation” (Bolter, 2001), in the sense that newer medium takes the place of an older one, borrowing and reorganizing its features.

Possible antecedents can be personal diaries and journals, if not the curio collection or scrapbooks. Whatever the case, it follows that blogs manage to convey a paramount sense of personal authenticity and trigger expectations from the public. The blog allows the author to share his/her views on a variety of subjects directed to a potentially global, but more often local, public. But at the same time, it engages its audience and invites them to respond and interact with the content produced by the blogger.

Bloggers establish their own independent perspective on destinations and provide neutral and more reliable information which can be effective in (re)building a destination’s image (Johnson, Kaye, Bichard, & Wong, 2007).

Through the case-study of Monterosso, we will try to track possible origins and derivations of the genre examining the features of blogs informing the web community of the disaster, supporting rebuilding and contributing to image reconstruction.

## 2.2 *The Linguistic Analysis*

Firstly, the study aims at investigating the discursive strategies used in blogs to respond to the crisis and restore the image of the area, drawing on principles and analytical tools in Discourse Analysis tradition (Fairclough, 1989, 1992, 1995) and on the narrative theory of Labov (Labov, 1997; Labov & Waletzky, 1972).

To address our research issue, we have collected a dataset of web texts from 27 blogs in the period spanning from October 25th, 2011 to February 29th, 2012.

We will start by presenting who the participants (the voices) are in the texts selected and to what extent they may be interpreted as active social agents in the interaction. As our dataset is too limited (15,245 words) to allow a quantitative analysis using frequency measurement, we decided to explore the quantitative distribution of words through a visualization realized using an on-line application called Wordle<sup>2</sup> generating word clouds based on the frequency of the words in a text.

In the following paragraph we will discuss the results obtained by this first analysis.

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<sup>2</sup> <http://www.wordle.net/>



6. The village of Monterosso possesses that element that is lacking in modern society. The people here know each other. The people here even care for each other. Many a wave and a smile are exchanged by the locals throughout the day.

Moreover — and more surprisingly — despite being non-professional blogs, they provide the most detailed ‘technical’ information concerning the area:

7. Monterosso is recovering quickly and will almost certainly be in perfect working order by the time the tourists start trickling in spring/summer 2012.

Blogs are obviously multi-party spoken text genres characterized by a high degree of what Bakhtin defines ‘dialogism’ (1981), the simultaneous and often dialectic presence of the voice of the writer and of the reader. Therefore, blogs are characterized by the frequent use of interpersonal pronouns, i.e., I, we and you. In some cases, blogs are more similar to written monologue, in other cases the dialogic interaction prevails because most blogs feature comments which react to or comment on the content of relevant posts. The use of posts, commentary and links contribute to realizing a peculiar kind of interaction, favouring a sense of community among bloggers.

The first person “I” is used to share personal memories about Monterosso and you have the impression that these people are “speaking” to us and “speaking” with us.

8. ...this group of five seaside villages is probably one of Italy’s most scenic travel destinations. I can confirm this as I have visited the Cinque Terre area on a few occasions, such as when I stayed at the [Soviore](#) sanctuary which lies in the hills above Monterosso.

9. I have stayed in Monterosso three times and it saddens me to see this.

The “I” characterizing the online environment, in the form of blogs, is relevant as it influences interactions aimed at supporting participation, partnership, and interconnectedness.

The call for solidarity and partnership is confirmed and enhanced by the strategic use of the personal pronouns “we”.

“We” obviously stands out as the ideal ‘solidarity builder’, together with “you”, the addressees of this call for help, as this excerpt exemplifies:

10. We’ve updated the following section, and will continue to do so as we find out about more ways you can help this devastated area!

“You” and the related possessive adjective “your” can be interpreted in the texts not only as addressed to the implied audience, the visitors interested in the tragic event, but also as an example of the use of direct speech. These types of texts are, in fact, aimed at involving the readers: on the one hand, they document personal experiences; on the other hand, they provide factual, useful information motivating people to action, i.e., encouraging commitment to help one another:

11. Any of you have asked for more information concerning the floods that hit Liguria last week. . . Your best bet is to follow the blogs and blog posts by people on the ground.
12. If you have not heard of the Cinque Terre, then you may not know that this group of five seaside villages is probably one of Italy's most scenic travel destinations.

At various points, there is a special emphasis on the personal dimension, and the symmetrical activation of an interpersonal component. The use of "you" throughout the whole dataset introduces a strong interpersonal component into the text, initiating a dialogue with readers and sometimes using questions

13. Yes, October 25, 2011 was a terrible day. But do you remember the good ones in Cinque Terre? (D3)

or exhortations

14. Make sure you don't miss these beautiful coastal villages in the Liguria region of Italy.
15. Please don't give up on coming here. (D3)

We have seen that the most distinguishing feature of blogs is their 'blogness', i.e., the quality of writing independently and without obligations. This emphasis on the personal dimension has allowed some scholars to identify the blog's generic antecedents in the diary and personal journal genre (cf. McNeill, 2003). The blog is a narrative form optimized for the web and, in our specific case, as travelling also means images, memories and their narrative enactments, prominence is given to different contributions from bloggers to make the message more credible and reliable. The narrative component play a central role from a discursive point of view as the exchange of information is likely to establish a value-laden reality to be shared by all participants. Narratives enhance communication and create a sense of empathy which helps create a common ground.

In this specific case, text analysis reveals that the narrative element is realized in three different forms:

1. there are narratives referring to the past, to events and situations before the flood,
  16. When I moved to the seaside Italian village of Monterosso al Mare, I was ready for a lot of things.[. . .] I was ready to stretch out on the beach in the morning, splashing in the clear as glass water.[. . .] My first summer in paradise went exactly as planned in my little slice of the Italian Riviera
  17. On October 24, 2011, I visited Cinque Terre while on a day trip with my group. We had a pleasant outing, although it did sprinkle a little.
2. there are narratives of events during the dramatic hours of the flood,
  18. On October 25th, 2011, the heaviest flash flooding in the history of Liguria devastated parts of the region. Monterosso was one of the worst hit. [. . .] The damage Monterosso sustained was worse than all previous disasters combined, including the devastations of World War II. I looked out the

window and saw my street turn into a deadly torrent of mud and water as I saw all the cars, parked helplessly, swept into the sea. [...]

19. The next morning I learned that Liguria, the region in which Cinque Terre is located, had received more than 20 inches of rain in 3 h. [...] Monterosso al Mare, had been inundated by massive flash floods of water, mud, and debris flowing uncontrolled through their steep and narrow streets to the sea. The ground floors of buildings—shops, restaurants, markets, schools, and homes—were filled with water and mud to their ceilings.
3. and finally there are narratives of actions performed after the flood in reaction to it
  20. Emergency crews arrived a few days later, Long before the hordes of tourists, Liguria was a poor region that could sustain itself only on what it could produce. [...] Reconstruction work is going ahead in Monterosso, so while staying there might not be advisable, nor possible, today, a visit in the near future should not be too problematic, although there will be building works going on. Please keep reading for more information on the travel situation [...] Hotels in Monterosso will start reopening in early March 2012, and more will open in April.
  21. The latest reports are promising. Most of the mud is gone. People are repairing and repainting their buildings. Drainage systems are being cleaned out and refurbished (see photos), and everything is on track to be ready for tourists by Easter.

All types of narrative are discursively realized on two different but intertwining planes: a public one giving the ‘objective’ accounts of the event, providing information and suggestions, and a private one made of personal experiences and memories.

Labov and Waletzky (1972) propose a model of narrative analysis that identifies “the invariant structural units which are represented by a variety of superficial forms.” Although this framework is nearly 40 years old, and is focused on oral narrative instead of written text, it continues to influence language studies and maybe — as another scholar suggested (Toolan, 1980), it becomes an ideal tool when analysing Internet writing, which is often less formal than other types of writing, but more structured than spoken language.

Labov defines narrative as “one method of recapitulating past experience by matching the verbal sequence of clauses to the sequence of events (it is inferred) actually occurred” (1997: 359).

His original theory of narrative structure, identifies six main parts of a narrative (abstract, orientation, complicating action, evaluation, resolution, and coda). They are not all necessarily present and not necessarily in this specific order. If we apply this model to the texts under examination, we can discover interesting things.

The so-called abstract, i.e., a summary or introductory part of the narrative which serves the purpose of attracting the reader may correspond to the lead of a newspaper article and the introductory paragraph of a blog text, as these examples show:

22. Three months have passed since the October 25th flood hit Monterosso, causing the village to experience the worst natural disaster of its entire history.
23. Monterosso was devastated by heavy flooding and mudslides on October 25, 2011.
24. Flood was horrible last October, but recovery went fast.

The next stage called orientation is also always present and it is aimed at providing the necessary information about the setting of the story that means locating events in time and space and introducing participants, as you see in the following:

25. I have been speaking everyday with our ex-next door neighbor Bruna. She is an 85 year young sparkplug who never stays still. Friday she took me into her cantina and showed me where her son-in-law was forced to cut a hole in the roof and help Bruna's daughter and granddaughter (who happens to be 8 months pregnant) escape to Bruna's apartment above. They had been in the cantina when the waters in Via Buranco rose so high, and with such force, that they slammed the door shut. The force knocked the keys out of the door and they were closed in.

These lines work as catalysers that lead up to the events and contribute to creating suspense and raising interest.

The complicating action introduces the threatening, descriptive action. It refers to the events told that make the narrative proceed. They provide the referential function of the narrative and report about the next occurrences representing the real backbone of the story:

26. Fire crews and civil protection teams worked their way through the flood-ravaged towns of Vernazza and Monterosso where cars were washed into the sea and roads turned into rivers. Officials said that within a 24-h period, 500 mm of rain had fallen and this had led to houses collapsing and roads and train lines subsiding.

The texts also offers many examples of evaluation, i.e., statements that tell the reader what to think about a place, a person, an event. Evaluation indicates why the story has been told and brings out the significant elements of the story, for the narrator and the readers, and make the story worth telling, as you see in these examples:

27. Monterosso occupies a very special place in my heart. Most of my family is from there. I grew up playing soccer on the beautiful beach in Fegina or having a fresh granita while talking a stroll through the town with my friends. It's a little paradise populated with a lot of good hearted people. [...] The streets, shops and bars I went to are buried in feet and feet of mud. Monterosso and it's people are on their knees, praying for a miracle!

The evaluative clauses may contain unrealistic clauses — negative, conditionals, futures — which refer to events that did not happen or might have happened or had

not yet happened. But usually the narrative may be interrupted by a subjective report of the writer's feelings, emotions or judgements, as in the following two excerpts:

28. Now I know this is a small disaster in the scheme of things, in a part of the world most of us will never see, but that doesn't mean we cannot care about the people there, nor offer at least a short prayer for their recovery.
29. It's heartbreaking....everything that was on via roma is in the same condition. i only know of 3 restaurants that survived unscathed. We were in Monterosso in June. This is so tragic. Does anyone know where donations can be sent to benefit the people of this devastated region?
30. If you have not heard of the Cinque Terre, then you may not know that this group of five seaside villages is probably one of Italy's most scenic travel destinations

The latter excerpt on the one hand weakens the power of the narrative by making the listeners aware that this is the narrator's experience and not their own. On the other hand, sharing thoughts and impressions about the Cinque Terre may encourage interaction and add realistic details to the whole picture.

The *coda*, provides a general view of the action, signals the closure of the narrative and takes back to the present moment. The narrator connects the story to actual everyday life:

31. For all our friends abroad who love Monterosso and want it to go back to it's old splendor here is the English version <http://www.rebuildmonterosso.com/> of the Italian blog [www.buongiornomonterosso.blogspot.com](http://www.buongiornomonterosso.blogspot.com), useful pages full of info that keep us updated on reconstruction of the village. LET'S HELP MONTEROSSO NOW!
32. In the meantime reservations for all the area are going nicely. People from all over the world love this land so much that they do not want to make Cinque Terre people lack their support even this year. It is rewarding for all the inhabitants and workers of the entire area. [...] There's an intense work going on the trails to rebuild all the vast net; much has been done already [...]

The strength of narrative as a communication method is that it manages to establish a common ground among all participants and provide a faster method of establishing a social relationship. The exchange of information is therefore value laden, but in a manner that creates credibility.

## 3 The Sentiment Analysis

### 3.1 An Overview

To complete our analysis, we performed a double sentiment analysis (Godbole, Srinivasaiah, & Skiena, 2007; Pang & Lee, 2008): firstly, on the contents of the selected websites; secondly, we considered the echo produced by the news related to the Monterosso's disaster on the social media in the period October 2011–January 2015.

Obviously, individuals have an innate sense in determining sentiments, therefore we could simply read the text delivered on the two websites and decide if the general mood was positive, neutral or negative. However, human beings are often influenced by personal opinion or one's own life experiences, therefore this approach risks to lack objectivity. For this reason, we have decided to detect feelings emerging from the contents, using sentiment analysis tools and some procedures that have been specifically developed in the R environment.

Yet, an extensive analysis of the feelings generated by the event on the web (the second type of analysis) would have resulted in an excessive, time-consuming and probably inconsistent outcome. In fact, it is not realistic for an individual to read thousands of possible comments, reviews, tweets and social communication within the web (Pak & Paroubek, 2010).

That is where tools derived from Artificial Intelligence (A.I.) come in (Lohr, 2012; Nasukawa & Yi, 2003). Thanks to cloud-based tools and procedures based on Natural Language Processing A.I. algorithms, it is possible to extract sentiment from content and from the web just as any individual would do, but much faster and allowing to obtain more consistent results, considering that humans hardly agree.

### 3.2 Tools, Materials and Methods

To perform a sentiment analysis of the content of the two considered websites, we used Semantria and Socialmention, two online free tools.

Semantria<sup>3</sup> is a cloud-based tool adopting a Natural Language Processing algorithm to perform the analysis. Following the software technical specification, the algorithm operates on the selected text through the following steps:

1. breaks the sentences of the document into their structural elements (e.g., nouns, adjectives, verbs, and adverbs), on the basis of the selected language;
2. identifies sentiment-bearing phrases (for example “terrible experience” or “unpredictable disaster”);

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<sup>3</sup><http://www.semantria.com>



3. each of the identified phrases obtains a logarithmic score, ranging from  $-10$  to  $10$ ;
4. the software combines the obtained scores and determines the overall sentiment of the text, assigning a score in the range  $(-2;2)$ .

The queries used by Semantria to calculate the sentiment of a phrase, are based on the closeness of a word to others. Once done, a hit count is updated with each result and after combined through the log odds ratio mathematical operation. Thus, a phrase receives its final score.

Semantria knowledge base takes advantage from Wikipedia, creating a Concept Matrix containing the indication of the closeness of the considered terms.

For a deeper understanding of the Semantria tool, you can consult the dedicated webpage<sup>4</sup>. Here we will limit our scope to a list of the outputs we can obtain from the sentiment analysis:

- highlighting the text, using different colours (red—negative; green—positive; gray—neutral) of significant text. These correspond and give form to the words cloud shown at the top of the results, giving a graphical interpretation of the analysis.
- the general sentiment of the document (positive, negative or neutral).
- a text summarization, extracting the most significant sentences and giving a concise synopsis of the original text.
- entities: significant terms/phrases extracted from the text
- themes: relevant themes from the source text
- categories (automatic or created by the user)

For each of the latter three, the results show:

- sentiment: positive, negative or neutral mood of all the mentions of an entity
- evidence: number of sentiment-bearing phrases associated to an entity (score 1–7 where 7 is the highest value)

We also performed our analysis using procedures we have specifically developed in R environment. R<sup>5</sup> is a free software environment for statistical computing and graphics that we used in Windows O.S.

To develop our sentiment analysis procedures, we have included the following R packages: library (plyr) and library (stringr).

We performed our evaluation considering the databases of positive, negative or neutral words. The details are presented in on of Minqing & Bing's works (2004), first, without groping the evaluations that is leaving the results in the range  $-5, +5$ ; then, grouping the 10 levels into four (Very Positive, Positive, Negative, Very Negative).

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<sup>4</sup> <https://semantria.com/support/resources/technology>

<sup>5</sup> <http://www.r-project.org/>

The pseudo-code of the procedures is the following:

```

Import text
Clean text from punctuation marks and abnormal characters
Divide text into strings separated by a blank character
Match text with db_positive_words
sum_pos = sum of detected correspondences
Match text with db_negative_words
sum_neg = sum of detected correspondences
return sum_pos, sum_neg
###considering all the positive and negative levels
import db_AFINN
create categories for each evaluation level
score = c()
for each evaluation level
match text with level (pos/neg)
sum_level = sum detected correspondences
score = score, sum_level
return score
###considering only 4 groups for levels
import db_AFINN
create categories
Vpos = db_AFINN with evaluation 5 and 4
pos = db_AFINN with evaluation 3, 2, 1
neg = db_AFINN with evaluation -1, -2, -3
Vneg = db_AFINN with evaluation -4, -5
score = c()
for each evaluation level
match text with level (pos/neg)
sum_level = sum detected correspondences
score = score, somma_livello
return score

```

As mentioned before, we also performed a sentiment analysis of the general feelings generated by the event on the web. For this purpose, we used the free online tool Social Mention, Topsy and backtweets.

Social Mention<sup>6</sup> is a platform that enables a search on social media performing an analysis based on the aggregation of user generated content, considering what people say across media platforms like Twitter, Facebook, FriendFeed, YouTube, Digg, Google, and so forth. The result is shown in an easy-to-interpret way, on a web page where we can read the detected sentiment, the top keywords occurring in communications, the top users influencing the general feelings. In addition, on the

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<sup>6</sup> <http://www.socialmention.com>

right, we have the possibility to see and explore the retrieved messages and to export data in CSV format.

To conclude, we have also created a script in R environment to perform sentiment analysis on tweets retrieved from the page <https://twitter.com/RBMonterosso>. In this case, we used the libraries: twitterR, ROAuth, plyr, stringr, colorspace, ggplot2, wordcloud.

We linked to Twitter through the Application Programming Interface (API). We then selected a specific search mode according to what we wish to analyze (a user or a word).

In our case, the pseudo code has been the following:

```

Assume "RBMonterosso" as the name of the user of the tweets we are
  searching for
Compose a list of all the tweet retrieved from the selected user
Assume "monterosso" as the string to search
Compose a list of all the occurrence (tweets) of the word "monterosso"
Load positive and negative words from the reference dataset
for every retrieved tweet
  remove punctuation
  remove redundant white spaces
  transform text in lower case letters
  transform the considered tweet in a list of words
  search all the positive or negative words in the considered tweet
  score = sum(positive words)—sum(negative words)
end

```

To create the graphic cloud of most recurrent words, considering all the tweets, we also wrote a procedure. Its pseudo-code is the following:

```

Consider the text of all the retrieved tweets
Remove punctuation and redundant white spaces
Transform text in lower case
Create a frequency table for each word
Create a column considering the length of the counted strings
Remove all the words having a length less than 3 characters
Remove all the words having a frequency less than 2
Create, using the package wordcloud(), a cloud of the remaining words

```

## 4 Results and Discussion

In the following section, we present the results obtained by the sentiment analysis performed on the contents of the website [www.Rebuildmonterosso.com](http://www.Rebuildmonterosso.com) using Semantria software.



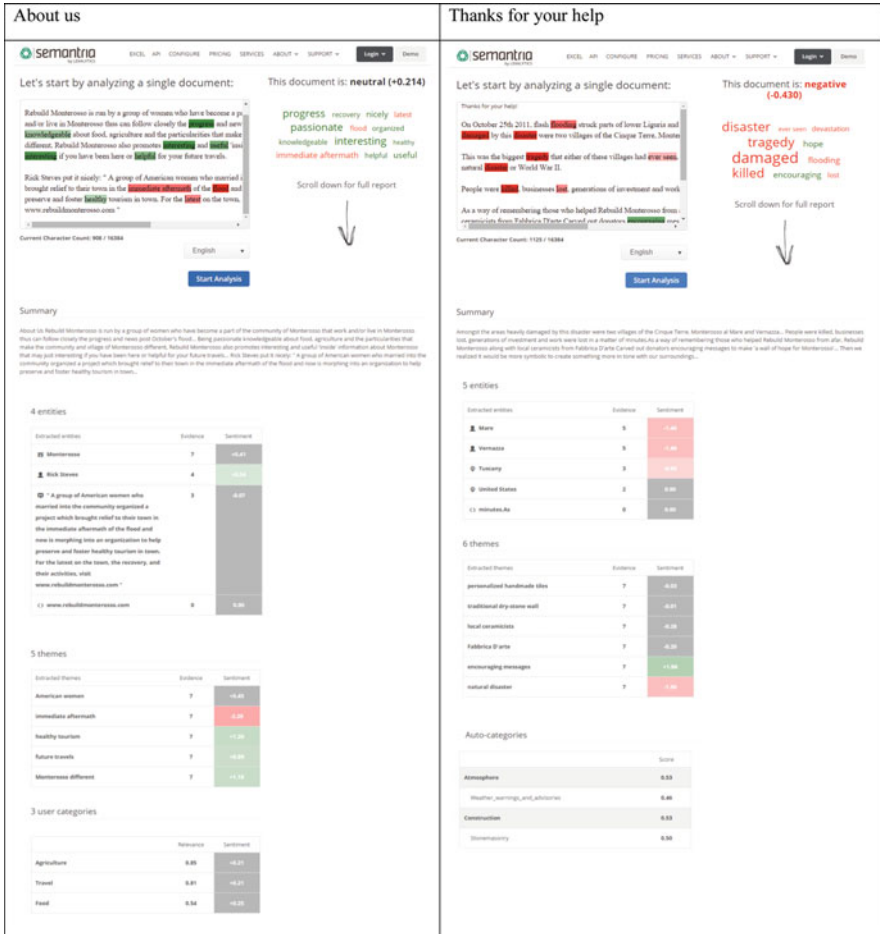


Fig. 3 Sentiment analysis of the content of the “about us” and “thanks for your help” webpages from the website [www.rebuildmonterosso.com](http://www.rebuildmonterosso.com), performed using Semantria software

The sentiment analysis of the contents (in Italian) of the website “buongiorno-monterosso.com” has been less significant because the website is rich in images and contains few textual parts.

We have to consider, in fact, that the website was created by the municipality of Monterosso to inform citizens and interested people about the reconstruction of the sites after the disaster. Therefore, most of the website is devoted to images, short comments and news.

The only page related to the disaster is “Diario del disastro (25 ottobre 2011)” that is, in fact, a diary of all the events that occurred on the day of the flood. As a result, the sentiment analysis could only be performed on this page obtaining a neutral result.

**Fig. 4** Sentiment analysis of the content of the “about us” and “thanks for your help” webpages from the website [www.rebuildmonterosso.com](http://www.rebuildmonterosso.com), performed using Semantria software

The screenshot shows the Semantria web application interface. At the top, the document title is "Diario del disastro (25 ottobre 2011)". The sentiment score is displayed as "neutral (+0.031)". A word cloud highlights terms like "stimano", "evento calamitoso", "scosso", "rimuovere", "prodigati", "crescendo", "Ritardano", "funzione", "evacuare", "volontari", "forze armate", and "pioggia incessante".

**4 entities**

Entity	Evidence	Sentiment
Protezione Civile	4	-0.17
25 ottobre 2011	4	-0.40
Brugnato	1	+1.45
Sandro Usai	1	0.00

**10 themes**

Theme	Evidence	Sentiment
anno intero	7	+1.56
immaginare la tragica evoluzione	4	-0.02
fronte ad una vera	4	-0.03
amici per la conta	4	0.00
ore a Brugnato	4	-0.01
stazione di Monterosso	4	-0.13
mm il quantitativo	4	-0.38
4 un giorno	4	-0.27
iniziata nella mattinata	4	-0.14
annullava il contorno	4	-0.25

**2 user categories**

Category	Relevance	Sentiment
Tempa	0.37	0.00
Elezioni	0.51	0.00

The result obtained with our procedures written in R confirm what we obtained with the described free tools. In particular, we have analyzed the webpage from the website [www.rebuildmonterosso.com](http://www.rebuildmonterosso.com) both using the database in (Minqing & Bing, 2004) and the scores obtained using the AFINN list of negative and positive words. Results are shown in the following Table 1.

The page “About us” resulted, with both the procedures, generally more positive than negative.

**Table 1** Write summary table obtained by the sentiment analysis performed on the webpages of “[www.rebuildmonterosso.com](http://www.rebuildmonterosso.com)”

	Results obtained by Minqing and Bing’s database of words	Scores obtained using the AFINN list of words			
Considered webpage	Score	Vneg o negV?	Neg	Pos	Vpos o posV
About us	neg: 0; pos: 12	0	0	9	0
Home	neg: 15; pos: 20	0	12	19	0
Thanks for your help	neg: 9; pos: 5	0	8	6	0
What happened	neg: 26; pos: 25	0	21	20	0

Also the “Home” page resulted, in general, positive, but, considering the slight difference between the two positions, it could be seen as a neutral result, thus confirming the results obtained with the free tool Semantria.

The page “Thanks for your help” gave us a general negative sentiment, while in the page “What happened” we can observe a more negative mood even if, also in these two cases, the slight difference between the two positions could be seen as a neutral general feeling. This latter analysis seems to be more accurate than those performed using Semantria.

Due to the use of Italian, on the page “Diario di un disastro (19 ottobre 2011)” from the website “[www.buongiornomonterosso.com](http://www.buongiornomonterosso.com)” we performed the sentiment analysis only using the Minqing and Bing database, translating terms into Italian.

In this case, we obtained the score: pos 6 and neg 19

Unlike the neutral score obtained with the tool Semantria, in this case the general mood results negative.

In the following section we will discuss the results obtained performing the sentiment analysis using the tool Socialmention<sup>7</sup> on the web sphere.

We tried different keywords to perform the search all over the web, but the most significant ones were “monterosso”, “alluvione” (flood), “2011”.

The most recurrent keywords linked to the event and extracted from the messages on the web are shown in Fig. 5 and are, in fact, strictly related to the event.

The detected general sentiment is neutral and most of the messages are in the form of videos on YouTube and derived from blogs (see Fig. 6).

To complete our analysis, in the following figures we show the results obtained analysing tweet by Topsy. We have retrieved all the tweets from 25 October 2011 to January 2015. As you can see in the following figure, the largest number of tweets has been posted in the first month after the flood, and they were mainly related to the damages caused by the disaster, and expressed a general negative sentiment (Fig. 7).

<sup>7</sup> <http://www.socialmention.com>



Fig. 5 Global results obtained by the tool Socialmention on the social sphere



Fig. 6 Most comments consist in videos from the web



The screenshot displays a Twitter search results page for the query "Alluvione Monterosso 25/10/2011". The left sidebar contains filters for "Latest Results" (Past 1 Hour, Past 1 Day, Past 7 Days, Past 30 Days, All Time, Specific Range), "Everything" (Links, Tweets, Photos, Videos, Influencers), and "All Languages" (English, 中文, 日本語, 한국어, Русский, Deutsch, Español, Français, Português, Türkçe). The main content area shows a list of tweets:

- Claudio Mandica** (@yilaw79): Alluvione Monterosso 25/10/2011 - YouReporter.it fb.me/y7rrmb7v
- Simona Modesto** (@simonamodesto): Alluvione Monterosso 25/10/2011 youreporter.it/video\_Alluvion... #impressionante
- Stefania** (@lostavenuecafe): Alluvione Monterosso 25/10/2011 youreporter.it/video\_Alluvion...
- ViTV** (@vity): Videonews ViTV: Alluvione Monterosso 25/10/2011 - Monterosso: via Roma trasformata in un torrente in piena ow.ly/1fjWBWE
- Virgilio** (@virgilio\_it): Videonews ViTV: Alluvione Monterosso 25/10/2011 - Monterosso: via Roma trasformata in un torrente in piena ow.ly/1fjWBEO
- Jacopo** (@jacopofarina): @charlesberman ricordi sole, mare e aperitivi? sembra un film... Alluvione Monterosso 25/10/2011 youreporter.it/video\_Alluvion...
- Paola Micarelli** (@paolamicarelli): RT @Adnkronos: L'alluvione a Monterosso: L'alluvione a Monterosso (25/10/2011 - 21:14:14) bit.ly/vRqKeH
- Adnkronos** (@adnkronos): L'alluvione a Monterosso: L'alluvione a Monterosso (25/10/2011 - 21:14:14) bit.ly/vRqKeH
- Luca Cimaroli** (@lucacimaroli): Alluvione monterosso 25 ottobre 2011 twitpic.com/75mmjd via @twitpic
- zriu284** (@zriu284): Alluvione monterosso 25 ottobre 2011 twitpic.com/75mmjd

At the bottom, there is a pagination bar with links for "< Prev", "1", "2", "3", "4", "5", "6", and "Next >".

Fig. 7 Tweets immediately after the flood

One year after the flood, tweets were much fewer and were divided into those dealing with recovery works and those aiming at reminding that the flood was not to be forgotten. The general mood is, in this case, positive (Fig. 8).

More recently, 6 months ago, the number of tweets drastically declined, while it became high again in the last month in the wake of corruption news related to the reconstruction of Monterosso's sites. The sentiment is, thus, generally negative (Fig. 9).

As mentioned before, we have also performed sentiment analysis on tweets retrieved from the page <https://twitter.com/RBMonterosso> using a procedure that is specifically written in R environment. We considered all the 147 tweets from the user RBMonterosso from the day of the flood to present and analyzed them with the procedure. The results were the following:

3 tweets with score  $-2$

6 tweets with score  $-1$

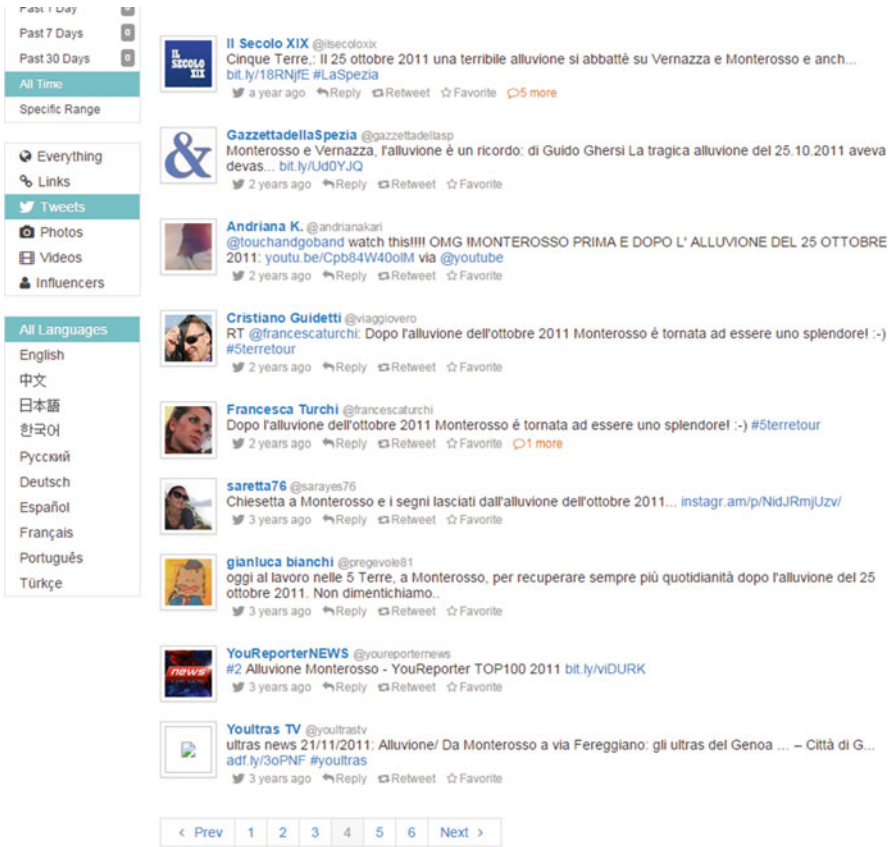


Fig. 8 Trends of tweets 1, 2 and 3 years after the flood

102 tweets with score 0  
 31 tweets having score 1  
 5 tweets scored 2

Where the sign “-” indicates a negative feeling, the sign “+” stands for a positive feeling, while if the score is 0 that means we have a neutral feeling.

Our procedure also provides the cloud of words most frequently used from the user @RBMonterosso, shown in Fig. 10.

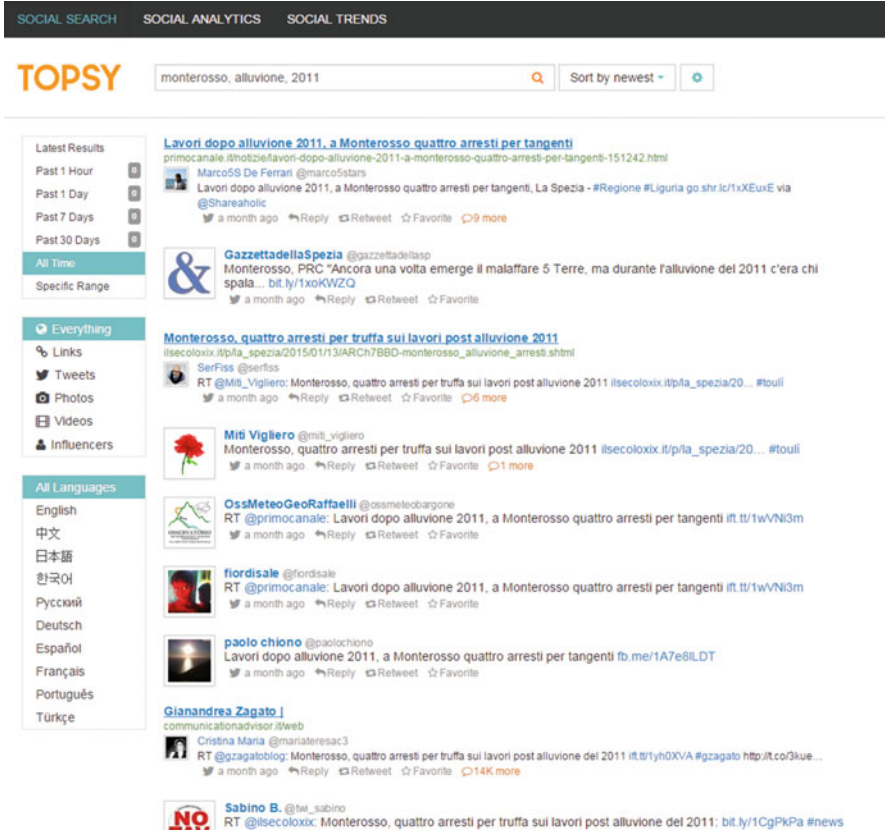


Fig. 9 Tweets in recent periods



Fig. 10 The cloud of most frequently used words by the users @RBMonterosso on twitter obtained from our procedure written in R

## 5 Conclusions and Further Developments

The aim of this study has been to explore the use of web resources to trace the discursive strategies enacted in the image restoration of the tourist destination of Monterosso. In our opinion, the findings allow to identify certain patterns in the data.

The use of the Internet in general, and of web 2.0 applications and services in particular, seem to confirm their functional role in delivering information and contributing to managing and — possibly recovering from — a crisis. And this sounds even more striking when web-based communications from institutions (State, Region, Province, Tourist boards) are missing.

Bloggers stand out as expert testimonials, as members of communities who provide updated information and suggestions. They send out persuasive and promotional messages expressing strong affection and thus a high level of involvement and empathy.

Moreover, weblogs constantly update information and follow the evolution of the situation: crisis, effects, emergency, rebuilding. This reporting is interestingly accompanied by story-telling, i.e., the narration of personal memories which contribute to depict Monterosso as appealing as it was before the flood and as appealing as it is now.

Similar choices in discursive strategies result in different and opposite suggestive effects. On the one hand, blogs underline personal experiences (especially bloggers' own experiences as visitors) and the commitment of the local community, together with volunteers and supporters engaged in the effort to take this land back to its beauty. On the other hand, blogs have evolved into more complex discursive forms and are delivered on the websites of institutions, organizations, newspapers and magazines. So in this multiplicity of voices, there are professional bloggers and individual bloggers, but the distinction between public and professional, and private and spontaneous is increasingly blurring. The blogosphere has become the public sphere where opinions and consensus are realized through communicative actions, through the exchange of opinions and information. A blog "empowers individuals on many levels" (Blood, 2000) and therefore one can argue that questions of power and social control come into play.

Our findings have also been supported by the sentiment analysis performed on the contents of the two considered websites.

The sentiment analysis showed that the predominant feeling was neutral over time, with a greater emphasis of negative feelings in the stages immediately after the flood.

It must be said that little attention has been paid to texts on the two websites in terms of social web-oriented communication, and that the terms chosen by authors of the webpages do not seem to contribute to eliciting the expected feelings.

In addition, both sites are not updated. In fact, the latest changes date back to 2013.

Similar impressions were detected by analysing web communication and in particular the tweets related to the flood. The tweets were numerous and showed a negative connotation during the first months after the flood, while they have dramatically decreased in the following periods, where we detected generally more positive messages, related to the reconstruction of the damaged areas.

In more recent months, the general sentiment detected by tweets, which have increased in number again, is negative, because it is linked to corruption news related to the processes of reconstruction.

In future works, we aim to refine our procedures using AI algorithms that seem more reliable (such as, for example, artificial neural networks) and also suitable to follow the sentiment over time. We also aim to refine the database of terms used to perform the sentiment analysis, with the aim of creating a tool able to distinguish not only languages but also different contexts and writing styles.

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# Attitudes of MBA Students Towards Social Networking Sites for Online Travel Related Activities

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and Konstantina Saliaka

**Abstract** Nowadays, the use of Social Networking Sites (SNS) is becoming indispensable. On SNS people provide authentic information about their travels, gained through personal experience and when they interact over a long period of time they trust the opinions of their ‘friends’ or ‘followers’ and take them into consideration when making a purchase decision. The paper aims at investigating attitudes of MBA students towards SNS use for travel activities. It takes into consideration four popular SNS, namely Facebook, Twitter, LinkedIn and Google +. Fishbein model was used for the evaluation of students’ attitudes. The findings reveal that MBA students use SNS for getting socialized with other travelers and companies and informed about tourism destinations/companies/travel. Facebook is the most popular Social Networking Site for travel activities except from the professional reasons (e.g., search for job in the tourism sector), in which LinkedIn comes first.

**Keywords** Social networking sites use • Travel • Facebook • Twitter • Linked in • Google + • Fishbein model

**JEL Classification** O33 technological change: Choices and consequences • Diffusion processes

## 1 Introduction

In recent years, www has changed the way people work and live and has caused a revolution in communication: the ability to send and retrieve information everywhere. Internet-based access to information and communication has become ubiquitous (Murchu, Breslin, & Decker, 2004). Internet is more than just a place to find information, it can be used to connect people to each other for commercial or business purposes, to create ‘friends’ or even to find someone distant lost kin (Helou & Zairah, 2014).

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The existence and the use of the facilities for communication and promotion of information through social media started in 1978 when users had the ability to send online messages (e-mail) with comments and information to other users, and to read and publish (Acar & Polonsky, 2007). The size and accessibility of the above facilities have grown remarkably and now include online activities, such as online communication with the use of a camera (webcasting), blogging, online messages, online conversations (chatting) and online gaming (Boyd & Ellison, 2008).

Social Media are very important communication channels used by individuals in order to create content, to promote material, to share ideas, to express opinions and to use/create information and skills. These channels have changed the way of communication between consumers and the traditional producers of messages and information (Denegri-Knott, 2006). Moreover, social media offer online services, where the individuals can form strong public profiles about themselves and include in these their personal interests, their philosophies, as well as their education, which are exposed to any other connected with the social media sites user. In social media sites the users can indicate the relation they have with other users and also follow those with whom they are connected (Boyd & Ellison, 2008).

The rise of social media is one of the main challenges that tourism destinations and businesses confront (Sotiriadis & van Zyl, 2013). Social media allow tourists to interact and share their experiences, travel advice, views, suggestions and recommendations. In this, vein social media become the primary medium by which travel information is shared (Xiang & Gretzel, 2010), a new digital form of word of mouth and one of the most important information sources for travel planning (Litvin, Goldsmith, & Pan, 2008; Schmallegger & Carson, 2008).

Travel and tourism products are intangible, cannot be evaluated prior to their consumption (Pan, MacLaurin, & Crotts, 2007; Rabanser & Ricci, 2005) and depend on accurate and reliable information (Kaldis et al., 2003). Therefore, travelers during their decision-making process collect and review various forms of travel information in order to minimize the risk of making wrong decisions (Leung, Law, van Hoof, & Buhalis, 2013).

All the above indicate the importance of social media in nowadays peoples' lives. Especially, young adults use SNS at a percentage of 89 % (PewResearchCenter, 2014). Travel and tourism have for a long time been one of the most visited categories of websites and web 2.0 applications. However, existing studies have hardly discussed the effect of SNS use in the context of travel (Kim & Tussyadiah, 2013). The paper tries to fill this gap and investigates attitudes of MBA students towards social networking sites use in online travel related activities.

## 2 Literature Review

Social Media such as social networking sites and user-generated services have spread massively from 2003 (Boyd & Ellison, 2008). What mainly characterizes user-generated services is the fact that consumers—users produce, plan, publish or



process content at media (Krishnamurthy & Dou, 2008), so the service is self-made. On the other hand, Social Media enable user to share and interact with others and thus the content becomes more democratized (Drury, 2008). Although there are some differences in the above, the sense of social media and user-generated services has been used interchangeably (Kaplan & Haenlein, 2010).

Up to now, academic research focuses on social networking sites (Boyd & Ellison, 2008) user-generated services (Shao, 2009) and Social Media (Walker Rettberg, 2009). Investigating the incentives for consumer participation in Social Media allows learning about consumers' activities. Previous studies have also focused on social media consumers' incentives (Grace-Farfaglia, Dekkers, & Sundararajan, 2006; Raacke & Bonds-Raack, 2008). Many studies on social media and user-generated media investigate use and gratification (Park, Kee, & Valenzuela, 2009; Shao, 2009). These approaches focus on consumers' incentives for using social media and the consequences resulting from these incentives (Blumler & Katz, 1974). The gratification studies exploring social media show similar findings. Stafford, Stafford, and Schkade (2004) found that consumers' have three main gratifications or motives for using the internet as a medium: information, entertainment, and social aspects. This finding has been supported and extended by more recent research on user-generated media which has identified information, entertainment, social interaction and community development, self-actualization and self-expression as motives (Courtois, Mechant, De Marez, & Verleye, 2009; Shao, 2009). Krishnamurthy and Dou (2008) separated motivations into two main categories: rational motives, such as knowledge-sharing and advocacy, and emotional motives such as social connection and self-expression. Park et al. (2009) found out four incentives that lead to the use of Social Media: socializing, entertainment, self-status seeking, and information.

As activities of consumers-users in social media are concerned, they are related to how active or not the users behave online. Community members have frequently been grouped according to their communication behavior and in this context the poster-lurker dichotomy has been widely used (Schlosser, 2005). Using this approach De Valck et al. (2009) identified six different virtual community member types based on members' communication/participation patterns: (1) Core members: those who contribute to the community the most by retrieving, supplying and discussing information (2) Conversationalists: focus on discussing information (3) Informationalists: mainly retrieve and supply information (4) Hobbyists: focus on maintaining and updating their personal information on a website, (5) Functionalists: interested in retrieving information, and (6) Opportunists: only retrieve marginal content from a website. This categorization is thus based on information activities, and did not include other types of activities (Avadanei & Bejan, 2012).

In contrast, Shao (2009) proposed that people perform a variety of activities online, such as consumption of information and entertainment, participation in social interaction and community development, production of self-expression and self-actualization. By the term consumption refers to reading of content of other users' posts, and participation to making comments of the above posts, while production means posting one's own content on the site. Most researches have

focused on those users' activities that are associated with the known User-Generated Content (UGC) emphasizes consumers' communication behavior based on the dichotomy of contribution (posting) and consumption (lurking). Consumers, who are not very active online, usually don't tend to participate and post information in Social Media (Jones et al., 2004; Joyce and Kraut, 2006; Preece et al., 2004). However, apart from activities based on communication and information needs, other researchers focused on the importance of social networking and entertaining (Heinonen, 2011; Schau et al., 2009).

## **2.1 Use SNS by Tourists**

SNS have fundamentally changed the way that tourists' search for information and their travelling decision making process (Ráthonyi, 2013). Certain product categories on the web, like tourism products, require more information for people to make a purchase (Vrana, Zafiroopoulos, & Vagianos, 2012). Tourists in order to decrease the uncertainty collect more and more indispensable information in connection with the travel (Ráthonyi, 2013) therefore, recommendations on the web are very helpful. On SNS people provide more authentic information, gained through personal experience (Sharda & Ponnada, 2007) and trust one another rather than official marketing advices. Kozinets (2002) wrote characteristically, that people, who interact in spaces like blogs over a long period of time, trust the opinions of the other users and take them into consideration when making a purchase decision and Sigala (2007) that an opinion or a recommendation from an acquaintance or a 'friend' has tremendous impact on the tourists' travel decision making process.

The social dimension of tourism can attribute the essence of tourism experience (Kim & Tussyadiah, 2013). Thus, using SNS helps to meet tourists' social needs by allowing "the emergence of a mobile and network sociality," which is a "complex intersection of face-to-face interaction and mediated communication, co-presence and virtual proximity, corporeal travel and virtual motilities" (Mascheroni, 2007, p. 527).

## **3 Methodology**

An empirical research study was conducted using an online survey. An online questionnaire was created and the link was sent to 200 MBA students in universities in North Greece. Totally, 153 questionnaires were returned and after conducting all necessary controls 144 were used for data analysis.

Qualitative research, in form of in-depth interviews took place on 17 November, 2014 in Technological Education Institute of Central Macedonia (Serres). Specifically, seven users of social networking sites were interviewed. The purpose of the qualitative research was to explore in depth respondent's point of view,

experiences, and perspectives about SNS use, frequency of visiting their personal profile and the hours spent on a daily basis on them. Based upon the qualitative research a questionnaire was constructed. Then a pilot study with 10 MBA students was conducted to pretest the questionnaire. Weaknesses were recorded and corrected.

Finally, it is worth noting that some questions in the questionnaire are shaped in a certain way in order for the collected data to be used in applying the model of Fishbein to quantify consumer attitudes towards SNS.

### 3.1 *Fishbein Model*

Since the introduction of Fishbein model in social psychology, it has become an important tool for marketing research and evaluation of consumers' perceptions and attitudes. It is easy to note the popularity of the model, since it is very simple to be implemented and also its apply covers a wide range of products. Nevertheless, the theoretical background of the model is generally neglected (Scholten & Correira, 1994).

With the Fishbein model consumers' evaluation of various features can be quantified. The consumer may give different weight to each feature and then the consumers' attitudes are calculated by using a combination of these features and how important it is for the consumer (Fishbein, 1967). The model of Fishbein is based on the following formula:

$$I = \sum \beta_j X_j$$

In which,

$b$  = the weight (importance) of the feature  $j$

$X$  = view (evaluation) of the consumer for the feature  $j$  (Scholten & Correira, 1994).

The paper investigates attitudes of MBA students towards four SNS: Facebook, Twitter, LinkedIn and Google+ regarding use for travel activities. Fishbein model was used in order to quantify the weight of the incentives for using the four SNS for online travel related activities.

## 4 Findings

In Table 1 students sample profile is presented. In the sample 50 % of the students were male and 50 % female. The majority belongs in the age frame 26–35 years old and a significant percentage of 33 % is over 36 years old. Regarding their professional status 63 % are employed (civil servants, private employees, freelancers) and 37 % are unemployed.

**Table 1** Sample breakdown

	Frequency	Percentage
Gender		
Men	72	50
Women	72	50
Age		
<25	32	22
26–30	36	26
31–35	28	19
36<	48	33
Marital status		
Married	48	33
Single	92	64
Divorced	4	3
Widower	0	0
Professional status		
Unemployed	52	37
Civil servants	44	30
Private employees	28	20
Freelancers	8	5
Other	12	8

All of the responders use Internet. This is something expected, since not only Internet has totally invaded in nowadays lives, but also it is a necessity for the accomplishment of the projects, during postgraduate studies. Regarding time spent on a daily basis on the Internet, the majority spent from 2 to 4 h. Those respondents are of all ages, gender and professional status. Also, 44 surf daily on Internet less than 2 h. Those ones are mainly up to 36 years old, married and civil servants, so probably they don't have a lot of free time to spend on Internet. Only 16 of the responders spend more than 6 h a day in Internet, and those are under 30 years old, men and employed, so probably they need it for their job.

Of the 144 students who participated in the research, the 140 (97 %) are users of social networking sites and only 4 persons (3 %) are not. Those who are not users of social media are unmarried men 31–35 years old. They surf on Internet less than 2 h a day and connect to it only from their home and through laptop or desktop. So generally, they do not seem to be very active regarding Internet, as exactly Schlosser (2005) stated. Regarding reasons that they are not engaged in social networking sites they mentioned: lack of interest or motivation to use them, disagreement with the concept of social networking, consider it as poor use of time, preference of other forms of communication, preference of engaging in other activities and fear about cybersafety.

All of the students are aware of Facebook. Next come Twitter, then Instagram and LinkedIn. Other social networking sites don't seem to be very popular towards this sample of students. It is worth saying that the younger ones know a lot about SNS. Instead, the older ones, especially 36 < years old, know only Facebook,

regardless of age and professional status. Once more it is obvious the difference between ages, since the younger ones are more familiar with social media. In this question each respondent could give more than one answer.

From the answers of the respondents it is noticeable that the Facebook comes first in the preferences of students with 83 %, which means 120 out of 144 students have a personal Facebook profile. Next is LinkedIn with 42 % (60 students) and third one is Twitter with 52 students (36 %). In this question each respondent could give more than one answer, too. It is quite interesting, the choice of social networking sites in relation to the gender of the students. The sample consists equally of male and female. However, women show preference to Facebook while men come first on the rest sites and particularly in LinkedIn. Moreover regarding the ages, the older ones had personal profiles in Facebook, Twitter and last LinkedIn. Those students who have only one profile, mainly have a Facebook profile, and are the older ones (36 <). The younger ones tend to have many profiles, and some almost have profiles in all social media. Especially, those who are unemployed tend to have a profile in Linked In, probably because they search for a job and LinkedIn is considered as a professional Social Networking Site.

About the half of the responders visit their personal profiles one time per day, while 12 students (8 %) once a week. The 56 out of 144 seem to be the heavy users of this research, since they visit social networking sites more than one time per day. Those, who visits their personal profiles once a week, are all women, 36 < years old, civil servants, have profile only in Facebook and spent less than 2 h daily in Internet. Instead, the heavy users consist mainly of men, regardless age. So, men seem to be more active regarding social media and generally Internet.

The average stay in personal profiles for the majority of respondents (36 %) is from 20 min till 1 h per day. Until 1 h stay students of all ages, but the most are employed, so maybe due to lack of time stay so short time. The same is for the ones who spend less than 20 min per day in their profiles. The majority is also employed and in addition 36+ years old and married, so they also don't have much free time, due to work or family obligations. Those who spend more than 3 h are unemployed and young students (<30 years old) who spend also too many hours in Internet generally and are aware of many social media. So in conclusion, the younger ones, who have no families or a job, tend to spend more hours in their profiles daily.

Regarding the motives that prompt students to use social networking sites, there is a wide variety of reasons and incentives. A percentage of 69 % of the students support that a personal profile offers them social networking, while a percentage of 64 % uses SNS for information. Approximately the half of respondents have fun when dealing with SNS or take a pleasant break from their work, while about 30 % use them for professional reasons and need for communication. The findings are similar to what Stafford et al. (2004) stated.

Then, points were count for each of the four social networking sites regarding their use for online travel related activities. The SNS that is used more often for travel information is Facebook (124 points). However, this is something expected, since taking into consideration the results from previous questions Facebook seems to be first in the students' preference. Next is Twitter with 67 points, then LinkedIn

(54 points) and last Google + (42 points). These four SNS have the same sequence and in previous questions, regarding the awareness of social media and the personal profiles in them. So, the frequency of using the social media for online tourism activities is directly connected with the awareness of them and the percentage of profiles created in them.

Next question identifies reasons that MBA student use SNS for travel related activities. A five point Likert scale was uses ranging from 1 (not important) to 7 (very important). The main reason that MBA students use Social Media is to get information about tourism destinations/companies/travel, which gathered the most points. Next come social networking with other travelers and companies, professional reasons (e.g., job search in the tourism sector) and entertainment-gamefication. These results show how important is now considered the role of the social networking sites, since most users do not pursue social networking with other travelers and companies only, but in addition they are more interested in offered information. Regarding gender, women firstly want to get information about tourism destinations/companies/travel, then seek for social networking with other travelers and companies and entertainment-gamefication and last come the professional reasons. Instead, men's main motivation is professional reasons and then the information. Next is the social networking and entertainment-gamefication. So there is a contrast between genders. Regarding ages students aged <35 years old, are interested first for information, after the social networking and entertainment. The 36–40 years old after the information use social networking sites for professional reasons, and give value in entertainment and social networking. The main conclusion is that all ages are concerned primarily in getting information about tourism destinations/companies/travel.

#### ***4.1 Analysis Based on Fishbein Model***

Based on the responses of the previous question, the weight of the four incentives was calculated. Weights of incentives are presented at Table 2.

Information about tourism destinations/companies/travel and social networking with other travelers and companies have the biggest weight. Professional reasons and entertainment-gamefication come after. Continuing, for each of the four social networking sites separately, an analysis was made based on the Fishbein model. In order to calculate  $X_j$  was used a 7-point scale with positive evaluation in 7 and negative in one, while for the figure  $B_j$  were applied the results of weight (Table 3).

And the overall scores regarding the relationship between motivations and social networking sites by applying the formula are the followings (Table 4):

According to these results, postgraduates-users have the most positive attitude towards Facebook, next towards Twitter, LinkedIn and finally the Google + for travel related activities. Facebook collects the highest scores in all motives except from the professional reasons, in which comes first the LinkedIn. This makes sense since the LinkedIn is considered as a professional social networking site. Twitter

**Table 2** Weight of incentives

Incentives	Total units	Average	Reduction in unit
Social networking with other travelers and companies	151	4.2	0.25
Entertainment-gamefication	136	3.8	0.22
Information about tourism destinations/companies/travel	173	4.8	0.29
Professional reasons (e.g., job search in the tourism sector)	143	4	0.24
Total	603	16.8	1

**Table 3** Implementation of Fishbein model

Social media	Social networking with other travelers and companies	Entertainment-gamefication	Information about tourism destinations/companies/travel	Professional reasons (e.g., job search in the tourism sector)
Facebook	148	134	111	84
Twitter	77	62	98	77
LinkedIn	103	50	95	133
Google +	50	44	54	54
Weight	0.25	0.22	0.29	0.24

**Table 4** Final score

Social media	Score
Facebook	118.83
Twitter	98.27
LinkedIn	96.22
Google +	50.8

and LinkedIn have almost the same score but are quite far away from Facebook. LinkedIn dominates in social networking with other travelers and companies and professional reasons, while Twitter in Entertainment-gamefication and Information about tourism destinations/companies/travel. Quite below in the score appears the Google +, but this is due to the fact that the 55 % of this sample of students don't know this social networking site so they don't have an opinion.

## 5 Conclusions

The paper investigates attitude of MBA students towards social media use in online travel related activities. It confirms the fact that social networking sites have become part of the everyday of an internet user especially young, high educated adults. It is characteristic that from the sample of 144 students only four do not have

a personal profile on social networking sites. The majority keep at least one and are aware of the most social networking sites.

The main reason that MBA students use social networking sites for online travel activities is to get information about tourism destinations/companies/travel. Next come social networking with other travelers and companies, professional reasons (e.g., job search in the tourism sector) and finally entertainment-gamification. Significant differences were recorded between genders.

Students who participated in this survey seem to have the most positive attitude for Facebook and the most negative towards Google+ regarding travel activities. Last years Google+ has invaded significantly in the Greeks' life; however there is a large amount of the population who do not know it. Instead, Facebook is the most popular Social Networking Site for travel activities except from the professional reasons, in which LinkedIn comes first.

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# The Significance of Electronic Word-of-Mouth (e-WOM) Content in the Shaping of the Visitor's Perception of Quality and Value

Simon Caruana and Claire Schembri

**Abstract** Websites such as [www.Lonelyplanet.com](http://www.Lonelyplanet.com), [www.holidaycheck.com](http://www.holidaycheck.com) and [www.tripadvisor.com](http://www.tripadvisor.com) serve as perfect platforms where travelers may share their experiences and opinions on hotels, restaurants and a number of attractions within a destination. Electronic Word-of-Mouth Communication (e-WOM) is one form of this User Generated Content (UGC).

This study looks at the literature related to quality, value and e-WOM and whether the same principles may be applied within the hospitality industry in Malta, in particular to try to understand how readers use e-WOM to form pre-purchase expectations of quality and value in a hotel.

When quantifying value, guests tend to associate value with the amount of money paid, personalisation and flexibility for a specified service. However different guests tend to rate them differently. This is reflected in the reviews managers would find on e-WOM fora. Similarly, the evidence gathered suggests that different managers have somewhat different views of what defines quality. It is however evident that the 'promise of quality' is a critical factor in that one must provide the facilities promised/advertised as guests tend to include this in their perception of value and will definitely rate them.

In spite of this, rather than a threat, management viewed e-WOM as an opportunity to showcase the strong points of the hotel and establish communication with customers, potentially creating loyalty.

**Keywords** Electronic Word-of-Mouth • e-WOM • Quality • Value

## 1 Introduction

The role of social media in the travel information search has been researched by Xiang and Gretzel (2010). The study showed that virtual community websites and consumer review websites are highly related with the keyword searches

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“accommodation” and “hotels” (p. 185). This proves the growing importance of the consumption of electronic Word-of-Mouth (e-WOM) relating to hospitality in a consumer’s pre-purchase decision making process.

These ideas are corroborated by real facts statistics from the web. Social networking platforms have become especially popular in recent years and are a significant part of internet use. For instance in the online travel world, Tripadvisor has become one of the most frequently used sites since its inception in 2000. Today, it boasts more than 280 million unique monthly visitors and over 170 million reviews and opinions. Its websites currently operate in over 44 countries worldwide, including China.

PhocusWright (2013) highlighted the growing importance of User Generated Content (UGC) in the hospitality industry. The study analysed the reasons behind travellers using these types of platforms and also what influences their decisions when booking a hotel online. The results from the study highlight not only the extensive use and growing importance of holiday review websites in the industry, but also offer an interesting insight about how UGC influences customers’ purchasing decisions. Some of the findings are listed below:

- 52 % use holiday review websites to help them find the right hotel for the right price.
- 83 % use holiday review websites to give them confidence in their buying decision.
- 77 % read reviews before booking a hotel.
- 53 % will not book a hotel without reading reviews.
- 65 % are more likely to book a hotel with a special award.
- 70 % are less likely to book a hotel with defensive management responses

These percentages highlight that travellers are more money-conscious and less willing to take risks in their hotel choices, thus use these reviews to build some perceptions about the hotel quality and value before making a purchasing decision.

This study attempts to explore the issues to quality, value and e-WOM in the hospitality industry in Malta. The main aim of the study is to understand how readers use e-WOM to form pre-purchase expectations of quality and value in a hotel. This shall be achieved by exploring the following questions:

1. Which tangible and intangible parts of service contribute to ‘quality’ and ‘value’ ideals in the hotel industry?
2. Which specific keywords in reviews do readers respond to when building perceptions of a hotel?
3. What is the overall significance of e-WOM in building these perceptions of quality and value?

By exploring this research questions, this study aims to give concrete examples of what signifies quality and value in the hospitality industry. Furthermore this study aims to provide a deeper understanding on how reviews are used to shape the reader’s perceptions when searching for a hotel.

## 2 Literature Review

### 2.1 *Word-of-Mouth*

Described as Word-of-Mouth (WOM) Communication, this sharing of information and opinions directs the receiver towards or away from specific products, brands and services (Hawkins, Best, & Coney, 2004). Definitions of WOM have evolved over the years. Westbrook (1987: 261) defined WOM as “all informal communications directed at other consumers about the ownership, usage or characteristics of particular goods and services or their sellers.” The key word in this definition is ‘informal’; WOM is built on interpersonal relationships, rather than media channels that pass product knowledge from the provider to the receiver. Numerous researchers have also studied how WOM is generated. For instance, Westbrook (1987) claimed that experiencing a product leads to an inner tension which could only be released by sharing the experience through WOM. Most studies focus on WOM as a secondary construct and a consequence of other constructs such as perceived value and quality, satisfaction and loyalty (Augusto de Matos & Vargas Rossi, 2008). For example, the generation of WOM depends on the level of satisfaction and level of perceived quality experienced. A positive level of quality and satisfaction might lead the consumer to share his experiences and recommendations. Similarly, dissatisfaction would create a regret experience which in turn would cause the consumer to “vent” the negative experience. Having a positive relationship with the company and its employees might create customer loyalty, which in turn makes the customer more likely to make positive recommendations through the dissemination of WOM (Sirdeshmukh, Singh, & Sabol, 2002).

### 2.2 *Electronic Word-of-Mouth (e-WOM)*

Based on Westbrook’s (1987) definition; e-WOM is simply all informal communications through internet-based technologies. This includes communication between producers and consumers as well as between consumers themselves (Litvin, Goldsmith, & Pan, 2006). The proliferation of the Internet and specifically of these social media platforms have made e-WOM extremely influential (Senecal & Nantel, 2004), partly due to growing distrust with official company communications (Mattila, Hanks, & Eun Kyoo Kim, 2010). Furthermore, viral marketing techniques such as buzz, social media marketing and ‘stealth marketing’ have faded the distinction between commercial messages and e-WOM (Lindgreen & Vanhamme, 2005) Thus, genuine and independent e-WOM has satisfied the demands for alternative sources of information for consumers. Tourism, as part of the services industry, offers intangible and experiential aspects. As a result, travelers are even more likely to use e-WOM as a point of reference (Augusto de Matos & Vargas Rossi, 2008).

### 2.3 *e-WOM Credibility*

The credibility or accuracy of e-WOM is not always assured. Some marketers have taken to creating fake reviews about their premises in order to boost ratings. Thus, consumers rely on cues such as review valance and the platform on which e-WOM is hosted to make inferences about the creator's intentions (Senecal & Nantel, 2004; Xue & Phelps, 2004). Lee and Youn (2009) found that reviews on blogs—compared with reviews on forums and special interest sites or specific consumer review platforms—are more likely to be seen as biased if they are positive. The perception is that marketers may pay bloggers to write positive ideas about their product or service. On the other hand, negative reviews are more likely to be viewed as credible. Review valance has a strong influence on consumer attitude. Positive reviews are often seen as ambiguous (Bone, 1995). Positive information about a product does not necessarily mean a product is of high quality. However, negative information in a review is seen as diagnostic, highlight the negative attributes which are more associated with low quality products (Lee & Youn, 2009).

### 2.4 *Quality*

What is Quality? This question posed to the general public will provide a myriad of different responses. Quality is an intangible and ambiguous construct which difficult to define (Zeithaml, 1988). It is often wrongly used as an alternative adjective for “goodness, or luxury, or shininess, or weight” (Zeithaml, 1988). Service quality is even more difficult to define due to the intangibility, heterogeneity and inseparability of services (Parasuraman, Zeithaml, & Berry, 1988).

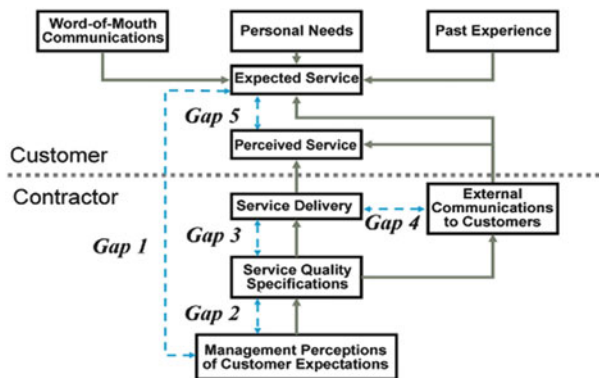
Garvin (1988) identifies five distinct approaches towards defining quality. These are the Transcendental-based, Product-based, User-based, Manufacturing-based and Value-based approaches. The transcendental quality identifies itself as that aspect which is understood when experienced, however is difficult to define concretely. Product-based and manufacturing-based are approaches which define quality in terms of measurable and quantifiable characteristics which are compared against a benchmark fixed by the supplying organisation. Products and services' excellency are determined by their 'conformance to requirements'. On the other hand, user-based definitions are based on the idea that quality is a perception of the individual, thus products or services that suit the individual's preferences and requirements best are deemed to be of the highest quality. An example of a user-based definition is one by the International Organization for Standardization; “The totality of features and characteristics of a product or service that bears its ability to satisfy stated or implied needs.” (ISO 8402: 1986, 3.1). Similarly, Kapiki (2012) gives a simplified definition of customer-driven quality as being “meeting or exceeding expectations.” These definitions encompass both the tangible and intangible aspects of a product or service and are relativistic; they focus on the individual

customer’s perception of how well product or service aspects satisfy his/her needs. Lutz (1986) believes that quality is an affective perception which is recognised when the experience attributes are greater than the search attributes. These attributes are intrinsic and extrinsic and would include the hotel location, building and facilities, amenities and services etc. Management can meet expectations by having a thorough understanding of all the service attributes that are expected and that create value, which in turn leads to satisfaction and loyalty (Evans & Lindsay, 2010). Perceived quality is also considered a form of attitude (Olshavsky, 1985); a global judgement about a product or service’s excellence and superiority (Zeithaml, 1988). The idea of superiority implies a comparison between similar products or services. A judgement about quality can be made from experience: measuring against an evoked set of past experiences and substitute products/services (Maynes, 1976; Zeithaml, 1988). Finally, value-based definitions of quality relate to the cost aspect of purchasing a product or service. In simple terms, it is the buyer’s idea of quality given at an acceptable price.

Parasuraman et al. (1988)’s work is the fundamental instrument for assessing customer perceptions of service quality (referred to as ServQual). Due to a firm’s inability to measure quality objectively, this tool transforms customer perceptions of quality service into a measurement; and is thus referred to as a “quantitative yardstick” (p. 13). Perceived service quality is viewed as “the degree and direction of the discrepancy between consumers’ perceptions and expectations” (p. 17) The ServQual model developed into a 22-point scale based on five dimensions of quality: reliability, assurance, tangibles, empathy and responsiveness. This model has been modified and applied to the hospitality industry at various times to varying degrees of success (Fig. 1).

Despite the wide adoption of the ServQual model in the services industry, a number of academics have criticised its validity, reliability and dimensional structure (Markovic, 2010). However, it is generally agreed upon that on a practical level, ServQual items serve as reliable markers of perceived quality (Khan, 2003). A major debate in the service quality literature is whether quality should be measured as the objective or subjective difference between expectations and

Fig. 1 ServQual model (Parasuraman et al., 1988)



perceptions, or perhaps using a different approach such as using performance as the main measurement of service quality. A performance-only model called ServPerf was developed by Cronin and Taylor (1992). Various other models were developed; all these works build on the basic theoretical framework of Parasuraman et al. (1988).

A compilation of attributes adapted from the ServQual model and other literature shed light on what hotel guests find important when evaluating perceived quality. Some practical examples are cleanliness, security and safety, employees' pleasantness, attention and competence, location, value for money and hotel amenities (Markovic, 2010).

## 2.5 Value

Zeithaml (1988) is credited for initialising the base work on the conceptualisation of the perceived value of a service (Woodside, Golfetto, & Gibbert, 2008). Her studies have gathered a lot of information about what value means for different people. Perceptions of value are very idiosyncratic and personal; some ideas are listed below:

- Value is low price
- Value is what one wants in a product
- Value is the quality received for the price paid.

These ideas have been fused together to create the following definition.

“(Value is) the consumer’s overall assessment of the utility of a product based on what is received and what is given” (p. 142).

This definition identifies three core aspects of value: the benefits received, the sacrifice entailed and the trade-off between the give and get components. When creating a value construct, Holbrook and Corfman (1985) identified intrinsic and extrinsic elements, quality and other high-value abstractions as the get components. On the other hand, give components include price and other non-monetary costs such as time, energy and effort required to obtain the product or service. This construct clearly highlights that value is a direct antecedent to purchase decision (Oh, 1999), and perceived quality is only a mediating variable in determining the overall value of a good. Zeithaml’s means-end model relating price, quality and value can be found in the Appendix.

The creation of value perceptions is a rather mindless activity; customers do not actively calculate each benefit and cost in an equation. Most perceptions are based on value triggers in the form of extrinsic cues such as price, advertising, branding and other information such as peers’ approval (Zeithaml, 1988). Experience goods such as a hospitality service have no intrinsic elements which one can ‘test’, thus the potential consumer needs to rely on other cues and sources of information to make a judgement about the good. The relative importance of each cue depends on the existence of other cues. Olson (1977) believes that when information about a



product or service is missing, price is the biggest indicator of quality for a consumer. Lynch and Ariely (2000) discovered evidence showing that exposure to online product quality information reduces consumers' sensitivity to price information. Previous studies have shown that with unfamiliar brands; price may be used by managers to imply the idea of quality or prestige (Zeithaml, 1985). When risk is high, consumers prefer paying more money for a good, as price is perceived as a quality indicator in difficult situations (Zeithaml, 1985). The 'risk' here is the financial commitment for a good with which the consumer has high involvement. A high involvement good is one where the consumer is very motivated and where the consumer spends a lot of time and energy in the search and evaluation processes. A hotel is considered to be a high involvement good for many travelers (Grohmann & Spangenberg, 2010).

## ***2.6 The Role of Hotel Classification***

Globally there are hundreds of different Hotel Classification Systems. Even within a country may find regional differences in these systems. There is no EU directive or unified framework with a fixed set of standards and regulations, and this very often leads to confusion, as what is considered three stars in one destination does not qualify in another. In fact, the European Consumer Centres' Network, in a study in 2009 analyzed 29 different hotel classifications in the Europe alone (ECC-NET, 2009).

To fill this unified system gap, since 2004, there have been attempts to create harmonized hotel classification system on a European level by HOTREC-Hospitality Europe. The aims are to provide common criteria and procedures for participating countries to set up or review national/regional hotel classification systems. The classification system should follow the '21 HOTREC principles' (Hotel stars union, 2014). These principles cover criteria relating to the hotel buildings/rooms, the furniture/equipment, services offered, leisure facilities and quality management systems.

The lack of a unified framework for hotel classification in addition to a heavy focus on tangible aspects in a hotel often creates a discrepancy between perceptions and expectations for tourists. Tourists from different source countries have different ideas relating to what a particular star category means. In addition, the assessment is based purely on tangible aspects and the availability of certain services (such as concierge, room service etc.), and does not rate the quality of the service during delivery. Furthermore, online travel agents such as Expedia have their own star rating system, which may or may not reflect reality. However, HOTREC is working with these agents so as to list the hotels from the countries participating in the Hotel Star Union according to guidelines provided by them.

As a result of these discrepancies, consumers are relying less on the hotel star ranking and more on other cues (Friedlander, 2014). These cues include: the location of a hotel, the type of trip, specific criteria (e.g., availability of parking

spaces, free wifi, and business centre), the price value of the hotel and the online reputation (Friedlander, 2014). These are cues are seen as more relevant and reliable than the actual star rating of the hotel.

## ***2.7 Hotel Classification and the Maltese Scenario***

In October 2012, amendments have been made to Maltese legislation covering the criteria relating to hotel classification to match the HOTREC standards. This move was done for a number of reasons; to create transparency and security for European guests travelling to Malta, to increase credibility and reliability of hotel standards, to improve upon the reputation of the industry in Malta and to provide better service quality overall (Malta Business Bureau, 2012). This is also in congruence with the Tourism Policy of the Maltese Islands 2012–2016 which also aims to improve the tourism product offering, increase quality and improve competitiveness.

According to a report the MTA published in 2011, all accommodation entities in Malta have understood the magnitude of influence of ICT and online marketing on their business. There is a constant increase of online booking sales and a demand for the hotel to have an online presence. As a result, a larger percentage of marketing budget are devoted solely to online marketing. However, there is a variance in e-marketing endeavors between larger hotels with international links and smaller family-run hotels. Larger hotels naturally have larger budgets and greater marketing support from the franchise or group. Furthermore, hotel chains normally have their own standards relating to service quality, and are also perceived as being of superior quality by consumers.

This study analyzes one segment of the hotel market: the 5-star hotel category. As the major public entities in Malta such as the Tourism Ministry, Malta Tourism Authority (MTA) and Malta Hotels and Restaurants Association (MHRA) are focusing on improving quality and added-value to the tourism product in order to promote Malta as a 5-star destination, this segment was seen as the most appropriate one for the scope of the study.

## **3 Methodology Adopted**

This study has been planned to include a two-pronged approach towards understanding how perceptions of Quality and Value are built through Electronic Word-of-Mouth (e-WOM). That of the guests and the management, within 5-star hotels. Since the study focuses on the consumer perspective and how consumers use the online information available, it was seen as natural to use hotel guests as a source of data. To collect guest-related data a quantitative approach was taken. A questionnaire was designed for hotel guests to fill in after their experience in a Maltese 5-star hotel. At the time of writing, the data collection had been completed and the

analysis of the quantitative data was underway. It will however be presented at a later stage.

On the other hand, a qualitative approach was deemed as more appropriate since a deeper understanding of what is Quality and Value in Hospitality from a local industry perspective was being sought. Furthermore, this research was concerned with managerial opinion relating to the topic of e-WOM, and how it's used to generate perceptions of Quality and Value in hotels. As discussed in the previous sections, e-WOM can be used as a tool to create a competitive advantage or also a source of negative feedback about the organisation. Moreover, the relatively small number of 5 star hotels on the Maltese Islands (11 in total) also suggested that a qualitative approach may be more appropriate. Requests for interviews were sent to the marketing directors/senior managers of all the 5 star hotels found on the Maltese Islands. At the time of writing, four managers had already accepted the invitation for an in-depth structured interview, and the data collected from the interviews processed, analysed and presented for discussion.

Interviews were seen as the best tool in this respect. Quoting Clark, Riley, Wilkie, and Wood (1997: 132), interviews are "a form of qualitative research that it is more helpful when one gives an insight into how individuals or groups think about their world and how they construct the reality of that world".

Moreover, with interviews it is possible to move away from the fixed schedule of the interview to probe further into some research topics and add further questions; thus gathering a greater wealth of information from each interviewee's perspective. The person being interviewed has a fair degree of freedom in what to talk about, how much to say, and how to express it. In this particular research process a semi structured interview was used, as it was felt that it was the most flexible tool for the size and scope of this research. A general framework for the interview was set up, with the main themes being Quality, Value and e-WOM and a list of questions which were asked.

Each interview was recorded, so that the interviews could be conducted more easily and naturally, as the researcher did not need to pause the session to take notes of any answers. The recorded interviews were then transcribed so as to have a hard copy of the answers. The transcriptions also facilitated analysis and comparisons between interviews.

## 4 Analysis and Results

The results of the study seek to demonstrate the viewpoints of hotel managers on aspects relating to Service Quality, Value and Electronic Word-of-Mouth. Four major conceptual categories emerged from the information provided by the participating managers. These were:

1. Quality
2. Perceptions

3. Value
4. Electronic Word-of-Mouth

From further analysis it was observed that these above four points were not being equally prioritised. It was possible to observe that the predominant issues with the persons interviewed seem to rotate upon the aspects making up quality and those related to e-WOM. While customer perception and value need to be taken into consideration, Maltese managers seem to place a greater emphasis on the diverse aspects related to quality together with those falling under e-WOM appear to be the main areas of concern when it comes to the portrayal of hotel online via e-WOM. Both within quality and e-WOM, it was possible to identify a number of arguments that were brought up by the managers throughout the discussions suggesting that they are very much of concern to management.

#### ***4.1 Definitions of Quality***

Desk Research had already suggested that Quality is a very difficult concept to define (Zeithaml, 1988), especially in services due to their intangible, heterogeneous and inseparable nature (Parasuraman et al., 1988). This was reflected in the heterogeneity of answers provided by the participants. While all the managers related service quality to guest expectations; Managers C and D mentioned financial aspects of quality in the sense of delivering what guests expect for the money they spent, reinforcing the idea that quality and value are two concepts not very well-differentiated in people's minds. Manager B believed quality is exceeding expectations by giving "that little something extra, such as a bottle of wine" and creating value for the guests. On the other hand, Manager A provided a somewhat different view by saying that service quality is very personal; its meaning varies according to who is consuming the service and when it is being consumed. This is in congruence with Garvin's (1988) user-based quality.

"It could be that if I'm staying in a hotel for a short period of time.. practically the location of the hotel is all that matters. There's no relation to service quality. But then, if I'm with my family, then service quality will become very important for me. With my family.. the emphasis would be on punctuality, cleanliness, type of products, spa treatments, kid menus and other children amenities. . . The focus of what quality is will change a lot depending on the type of consumer and the reason of travel." (Manager A).

#### ***4.2 Promise of Quality***

Kuneida (2012) explains that Quality has intrinsic and extrinsic attributes, thus in a hotel quality would relate to both the service and the facilities offered. This idea is

reinforced when Manager C described quality as “combination of elements”, and that quality in services and facilities are interlinked and difficult to separate. The image of a high-end, 5 star hotel is a mix of superior quality products, equipment and an extended luxurious service. Quality Service is given by staff which are well-trained and motivated to deliver and excel at their jobs. Manager B and D agree that any hotel can offer good physical quality in facilities and equipment, and that all the 5-star hotels in Malta are very beautiful, however the Staff Service is a results of training, motivation and a passion for delivering good service. Similarly Manager A brings to attention the importance of staff training and service culture when delivering a quality service. All the Managers agree that awareness towards delivering quality needs to be spread on every level, not just the concern of management. All Employees are part of the process in delivering quality.

When delving further into the topic of quality in facilities, manager A explains that guest expectations have changed considerably over the years and demand different things; the example of Wifi was used. Whereas Wifi was considered a luxury a few years ago, today it is a necessity, while in-house movies are now considered irrelevant. The other Managers reiterated the fact that the facilities must be portrayed as they are; the concept of 5-star hotel demands superior quality facilities and equipment. Manager B sheds some insight on international hotel chains, saying that the quality of the facilities must be the same throughout the chain globally. The quality is promised through the brand name; A hotel in New York and hotel in Malta must have the same level of quality.

### ***4.3 Strategies Adopted in Relation to Quality***

Managers B and C belong to different international hotel chains, and both highlight the importance of standards set by the mother company. While this is an advantage, it is also a lot of pressure to make sure that international standards are upheld. Manager D of an independent 5 star hotel also highlights this fact; claiming that independent hotels must create their quality operating procedures from scratch. However, this also gives them the flexibility to adapt to guests’ needs on a more personal level. All managers emphasised the importance of inter-department communication, with regular meetings and reviews. Different managers mentioned various other techniques such as case studies, projects, action plans and budgets for each department for continuous improvements in quality aspects. Brand guidelines were again mentioned by the managers from international hotel chains as an important part of strategy; the brand guidelines give targets on many aspects that must be achieved.

#### 4.4 *Perceptions (by Guests)*

Consumer expectations of service are all analyzed through surveys, indexes and other forms of communication with guests to gather feedback. For example, satisfaction surveys ask for feedback on all the frontline departments starting from Reservations, to Reception, Concierge, F&B etc. One manager also mentioned mystery guests as a measure of performance. These are discussed in department meetings and any necessary action plans are built upon valid criticism, comments or complaints. Brand expectations were mentioned, again emphasising the importance of creating consistency in service and achieving the brand promises. Furthermore, social media was mentioned as an important and powerful tool to gauge guests' feelings about the hotel service.

#### 4.5 *Value*

Zeithaml's (1988) definition of value is "the consumer's overall assessment of the utility of a product based on what is received and what is given". As previously mentioned, some managers blurred the distinction between quality and value by mentioning this give and get aspects as part of quality. The idea of giving and receiving was again mentioned by Manager D explaining that guests pay a very high price for hotel services, thus one must give the best service and product consistently in order for guests to get value that is worth their money. Similarly, many researchers claim that a high price is a cue or indicator of high quality or prestige in a product (Zeithaml, 1985).

..they know that they're not going to pay peanuts for the services at the hotel, but then we have to guarantee that the value given is worth their money. We try our best and are very proud of what we offer to our clients.

On the other hand, Managers A and B highlight that value is very personal. Both discuss the idea of guests needing to feel recognised, important and "treated as human beings". Manager B emphasizes the importance of a personalised experience and creating a special and memorable stay, and this is done through front-line staff by finding out who their guests are and what are their needs, and then being flexible enough to adapt the service to give the best service possible. Manager B claims that "Eventually, we want to find out everything there is to know about our guests".

Similarly Manager A focuses on the importance of staff-flexibility to create the "recognition aspect".

"Standard Operating Procedures are good functions and guidelines, but they are restrictive. In times of difficulty people just apply the SOP. When you have a person in front of you, the frontliner is not as attentive as he or she should be because in their mind they're processing the SOP.. I can do this, I can't do that.. so there has to be more attention and care. SOPs are there to be followed, but you need

to be flexible.... As a manager I need to make sure that I have the right people in place and that the team is acting genuine and motivated in their actions. Then I can give them the open space to move around.”

It is worth noticing that the managers had somewhat different viewpoints on what constitutes added value in a 5 star hotel. Managers C and D focused on the physical aspects of the hotel; providing luxury on every level, while Managers A and B emphasized the importance of recognition and personalised service, which lead to satisfaction and loyalty. Notwithstanding the contrasting opinions about what is added value, all the managers agree that competitive advantage is given not through physical amenities but through quality of service given by staff.

#### ***4.6 Electronic Word-of-Mouth and Its Impact***

All the Managers strongly agree that online reviews have heavily impacted businesses; especially for the independent hotels online reviews were seen as a “wakeup call, a prompt for change”. Manager D explains that before reviews, the hotel had more power in the sense that mistakes in services would not be so publicly promoted, as is the case today. Similarly Manager A emphasizes the importance of social media, also mentioning platforms such as Instagram which would instantly show a photo that could potentially ruin a hotel’s reputation.

#### ***4.7 E-WOM as an Opportunity***

E-WOM is seen as an opportunity by all the managers, for different reasons. Manager B views reviews as self-made marketing; reviews show the true character of the hotel as people experienced it. Manager C has similar opinions; claiming that:

The hotel is run by humans and we make mistakes. However we are genuine in our efforts and believe in our product, so we have nothing to hide.

Thus, reviews are a platform to show the efforts of the hotel to excel. Manager A sees E-WOM as an opportunity to communicate with guests. For example, answering reviews will add another dimension to personalised service and show that the hotel cares, perhaps creating loyalty. Furthermore it can be an opportunity to reach out to future/potential guests:

Showing that you are active online will encourage them to speak to you, ask questions and if they are resolved they might actually book.

#### 4.8 *Guest Expectations as a Consequence of e-WOM*

There is a congruence in every Manager's answers relating to e-WOM. All understand that there is a change in guests' expectations since the advent of online reviews. Guests are more knowledgeable, as "everything is out in the open". All the information they need is available online; there are no surprises, no adventures. Manager A explains that "Guests know exactly what they want and know what they're getting." Manager B describes the situation as an "implicit understanding" between hotels and guests; guests have an important tool in their hands which can affect the hotel's business. Manager D describes this as "a shift in power dynamics".

### 5 **Conclusions and Future Work**

The results of the interviews offer a very interesting insight on how hotel managers in Malta go about in offering Quality and Value and also how they have dealt with the changing trends and rise of online reviews. Although it was expected to find some variation, within the responses given, it was possible to identify the following common key points:

- Quality is a mix of both tangible and intangible aspects.
- These aspects are a 'chain'; they are all necessary to provide quality service
- Staff plays a key role in the provision of quality
- A high price for a hotel demands superior quality service. Value must be offered for the price paid.
- The consumer has become more powerful and knowledgeable since the advent of online reviews, thus making transparency in service all the more important.

This phase was concerned about the hotel management views, the providers of the service. The next phase of this project is to gather the views of the 'other side' that is the hotel guests, the ones at the receiving end. Having both the data from parties should provide the basis for an interesting comparative research exercise as to the views held by two actor categories found within the Maltese 5 star hotel sector, when it comes to e-WOM and perceptions of quality and value.

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# The Impact of New Emerging Technologies on Tourism Sector: Evidence from Lebanon

Andre Azouri, Ghada Salem, Ali Khreis, and Marwan Azouri

**Abstract** In a world where innovation has a life cycle that is faster than giving birth to a child, going from railroad, electricity, telephone, automobile to the Internet has been the most important innovation in our century (Hoffman, *Marketing Science* 19 (10):1–3, 2000). All of the innovation through out the years and decades has impacted the lifestyle of all the people living on planet earth and more specially the business world (Barwise, Elberse, & Hammond, *Marketing and the Internet*. In B. Weitz & R. Wensley (Eds.). *Handbook of Marketing* (pp. 527–557). Thousand Oaks, CA: Sage, 2006). Nowadays, Internet has taken a part in the life of each human being where they rely on it for working, learning, leisure, socializing, entertainment and shopping (Barwise, Elberse, & Hammond, *Marketing and the Internet*. In B. Weitz & R. Wensley (Eds.). *Handbook of Marketing* (pp. 527–557). Thousand Oaks, CA: Sage, 2006). In our research paper, we are going to focalize on the part where the Internet has become an essential part of any leisure or business trip we are planning. We are going to compare and analyze the impact of social media, emerging new technologies and e-tourism on the sustainable tourism and tourism sector in the Middle East, taking into evidence the example of Lebanon. This research will be divided into different parts: a literature review, an interview and a focus group analysis of this interview held in the Lebanese University.

**Keywords** Social media • E-tourism • New technologies • Tourism • Sustainable tourism • Middle east

**JEL Classification** O33 Technological change: choices and consequences • Diffusion processes

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## 1 Introduction

The world as we know it in the last century has evolved in a way that every product that had a life cycle of years has become a product with a limited life cycle of months. It took us years and decades to develop trains, railroads, cars, and to understand the power of the Internet. Now in a single year, a product has multiple upgrades, software are evolving on a daily basis, phone on a monthly basis, cars . . . Innovation has impacted the life style of all the people living on the blue planet, the ways of living has changed from groups to individuals living with a smartphone interacting with other people even if they are miles apart. Businesses are now depending on the Internet to maintain a high competitive background; we are in an era where the Internet has become a way of living and a life support for every single person (Barwise, Elberse, & Hammond, 2006). If we direct our attention to the touristic sector, we can see that it has become an industry based on the internet and the feedback of its customers, and not on what we imagined our destination will be. The rise of google and google earth, or tripadvisors has impacted this sector in a positive and negative way. In other words, if we want to visit a country or a site, we already know what to wait for and what our expectations are, due to the fact we can priori to our physical visit, visit this country or site virtually. So no more 'advertising lies' from the touristic companies as we could have witnessed when the brochure was the only way to see where we are going. We went from passive internet presence to an interactive user-generated content where each individual is free to submit any idea or advice via comments on any content on the web (O'Reilly, 2005). 20 years ago, nobody would have imagined the possibility of valuing a virtual company based on the internet for more than 1 billion dollars. Facebook now has more than 1.8 billion users worldwide connected and they can easily share comments and like anything with a single click on their laptops. This is why social media has become a crucial factor in the development of the tourism sector and especially in its sustainability. Collecting information, deciding on the destination we target, are now impacted by the comments and feedbacks of the internet users, even tourism promotion are now based on social media (Fotis, Buhalis, & Rossides, 2012).

The Internet has become the number one market place worldwide, where we can witness that the five most popular online purchase/search are for book, travel arrangements, gifts, CD's and clothes (Center for the Digital Future, 2008). Therefore many touristic organizations were obliged to go through a whole process of re-engineering its plans, so they could take advantage of the enormous market place that has been provided by the emergence of new technologies and this new internet-empowered business, where you can benefit from customers that are not based especially in the same geographical area as you, or we you can benefit from online users to develop a new marketing strategy via crowdsourcing (Laudon & Laudon, 2007). We can now witness a perfect and immense bond among new technologies as social media and tourism whereas the success of the tourism sector and its

sustainability depend on the success of the company and/or the country presence on the web.

Therefore, in this article, we are going to analyze the impact of new technologies and social media on the micro and macro environment of a touristic destination based in the Middle East, more specifically in the South of Lebanon, a region known as Bkassine that is well known for its archeological sites, caves, Roman and Phoenician presence and for its pine forest that is one of the few pine forests that are still intact in the region.

We are going to start with a literature review of social Media and new technologies, e-tourism and sustainable tourism, followed by an analysis of an interview that will be conducted in the region of Bkassine.

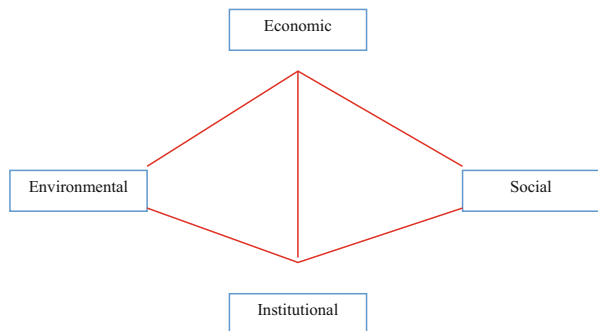
## 2 Literature Review

### 2.1 Sustainable Tourism

The international conference of environment ministers and biodiversity and tourism (1997) has come to a conclusion that tourism about sustainability and sustainable development that are applied to tourism should always be developed in a way that it fortifies local economy and enhance local workforce as well as developing new policies and legislations to ensure that the benefits of sustainable tourism return to the local community. Based on priori research we can now talk about a prism of sustainability which includes four dimensions: environmental, economic, social and institutional. The following prism has been an updated version of the traditional way of considering sustainable tourism which was developed following a three dimensions prism (Eden, Falkheden, & Malbert, 2000; Valentin & Spangenberg, 2000) (Fig. 1).

This prism will allow us to establish the sustainability indicators and the possibility to adapt the planning and management of the community of Bkassine to the standards of maintaining a sustainable tourism in their region. The standards and indicators of sustainable tourism have been taking part in multiple research and been suggested by multiple organizations, as per example the United Nations

**Fig. 1** The prism of sustainable tourism



commission on sustainable development. Therefore, in this article we are going to concentrate mainly on this prism to elaborate our interview questions; this part will be more elaborated in part 3 of this research.

## 2.2 *New Technologies*

New technologies and more specifically the digital technologies have changed the way of communication among people, and allowed them to communicate via a virtual portal or a new communication channel called smartphones, which has transformed the web into a new social place and market (Habibi, Laroche, & Richard, 2014).

That is why we are going to revise a literature review on two factors of new technologies that are social media and online booking using the technology of smartphones.

## 2.3 *Social Media*

Social media is a term used since we shifted to the web 2.0. We went from passive internet presence to an interactive user-generated content where each individual is free to submit any idea or advice via comments on any content on the web (O'Reilly, 2005). The easiest way to understand the difference between the web 1.0 which was based on a passive internet presence to the web 2.0 which is based on a user-generated content is to understand the following Table 1.

**Table 1** The core differences between web 1.0 and web 2.0 (<http://www.oreilly.com/pub/a/web2/archive/what-is-web-20.html>)

Web 1.0		Web 2.0
Double Click	→	Google AdSense
Ofoto	→	Flickr
Akamai	→	Bit Torrent
mp3 .com	→	Napster
Britannica Online	→	Wikipedia
Personal Websites	→	Blogging
Evite	→	Upcoming. org and EVDB
Domain name speculation	→	Search engine optimization
Page views	→	Cost per click
Screen scraping	→	Web services
Publishing	→	Participation
Content management systems	→	Wikis
Directories (taxonomy)	→	Tagging (“folksonomy”)
Stickiness	→	Syndication

Social media is the core of every business nowadays, due to the fact that we are shifting from a geographical market place to a worldwide marketplace. We do not have any more boundaries if we need to sell our product across the world. In term of tourism agencies that are dedicated to tourism, air companies can now advertise, sell and get feedback behind a screen that is a gateway to access to a whole new database of customers worldwide. Cohen (2011), has summarized the 30 different definitions on social media, where we are going to cite two of the most interesting definition that can help us understand why the use of social media in tourism is crucial: (1) Platforms, media and online tools that are the basis of social media are depending on information technologies; (2) The links that are created by social media are forming a virtual community, that is using cross platforms to interact with one another, therefore affecting the buying behavior and the choice of any person, which means its affecting the behavior of people. The user-generated content (UGC) have changed the way of thinking of the consumers when they need to shop, due to the fact the other consumers have shared information about the product or service, they also shared the pros and cons of the product or service which will facilitate the buying process of other consumers based on the comments left by users. Which now implies that the trip characteristics play a key role in the decision of the next travelers to pick a destination (Sigala, Christou, & Gretzel, 2012).

Now, we can witness a new role for social media, which is a marketing and promotional role, which has been included in the process of the tourism sector (Sigala et al., 2012). Social media has become an effective way of creating a marketing generated content and channel for the tourism sector (Sotiriadis & Van Zyl, 2013). New means for tourism is now provided by social media, whereas marketing organizations are now reengineering new processes and models for a new marketing era. The Lebanese Ministry of Tourism is now encouraging people to visit Lebanon and its touristic places that are being promoted via the use of social media (Ministry of Tourism, 2013). We cannot talk about the changes that are implied to the marketing sector due to social media, without talking about the cultural impact of it. Due to those changes, the tourism environment is changing permanently, due to the effect on the social interaction, construction of tourism imagination and the media consumptions (Sotiriadis & Van Zyl, 2013). Social media has become a part of a knowledge sharing and creation in the tourism sector, which has been made capable thanks to the online media platforms and networking which are contributing in a positive way, helping customers or travelers having an insight on the destination they are choosing and on the placement of the hotel they are picking as well as having a virtual tour guide giving them hints on where to go and where to not go (Sigala and Chalkiti, 2008). That is why using social media in tourism education have become an inseparable academic topic to be studied by the students, in particular the Facebook aspect of social media (Sotiriadis & Van Zyl, 2013).

## **2.4 E-tourism**

Tourism innovation is a concept that is still unclear, but we can know for sure that the Internet and social media have produced an essential contribution to the development of tourism and especially the e-Tourism. E-tourism is part of a process called e-commerce which is a process defined as a way of buying and selling products or services via the use of a network on a computer, the network is the internet (Turban, Lee, King, & Chung, 2000). E-tourism is part of a bigger picture that is called e-commerce that implies a definition of social commerce that was used for the first time in November 2005 by yahoo and then developed by David Beisel. Social commerce is based on a (UGC) that helps customers understand the value of the product they are buying as well as the pros and cons of it, and it affects the buying behavior of the customers. Those information that are being shared on the network, will allow the customers to decide if they are going to visit or not the destination they intended to visit. E-tourism will reengineer the processes of tourism, which implies a new way of using the Internet and intranet to develop a strategic relationship between the organization and all of its stakeholders. E-tourism includes all the factors of any business, e-marketing, e-finance, e-commerce. Having a good information system and management will allow the organizations to shift to the e-world as smooth as possible (Buhalis, 2003). Also Buhalis, in 2003, has quoted that the use of e-tourism means the development of trusted transaction process and partners to help the customers trust the system.

## **3 Methodology**

In this part of our article, we are going to present our research strategy for the data collection, and how we collected the data. After a brief resume on the context of the country, we submitted the research individual interview on persons within the town of Bkassine. This chapter part will also include the characteristics of the variables and the relationship among them, and the procedure we applied for data collection, sampling, and data treatment.

### **3.1 Research Context**

Lebanon is considered to be an unstable country due to the uprising of the extremist movement ISIS, which is implemented in all the countries that are surrounding Lebanon. As a macro geography analysis, from the North we have Syria, which is a country that is devastated by the war since years, and in the South we have Israel that is occupying the Palestinian Lands since decades. If we consider a micro geography analysis we can also witness an ethnical and religious country, where



we have a big concentration of Sunnite demographic in the North and a concentration of Shiite in the South. As for Mount Lebanon, there is a concentration of Christians; we can sound like a racist country but this is the configuration of our country even if it's considered as a taboo in the rest of the world. Our research will also be based on the help of the HELAND project that is funded by the European Neighborhood Partnership Initiative, which includes 10 partners from 6 Mediterranean countries. The HELAND project has a main objective that is to promote cultural heritage and landscape protection to foster quality and sustainable tourism.

### ***3.2 Data Collection***

For the article upon the impact of new technologies on the tourism sector in Lebanon, we used a primary source of data collection and administrated individual interviews based on questions. The individual interview was based upon dependent and independent variables that are presented in the next section of this part. The interview will be administrated on 50 individuals that are from the region of Bkassine.

### ***3.3 Sampling***

The following article has been conducted to understand the impact of new technologies on the tourism in a region in the South of Lebanon called Bkassine that is well known for its archeological sites, caves, Roman and Phoenician presence and for its pine forest that is one of the few pine forests that are still intact in the region. We used a probability sample that was randomly selected as a simple random technique. The population was the Lebanese residents of the region, aged from 24 to 64. The initial sample has been equal to 50 respondents with a possible rate of none respondents that is equal to 40 % and an active response rate equal to 60 %.

### ***3.4 Data Treatment***

The treatment of the result collected from the individuals has been analyzed through an individual analysis. As for the methodology used for the questions, the Likert scale that is originally coded such as strongly disagree = -2, disagree = -1, neither agree, nor disagree = 0, agree = 1, and strongly agree = 2 (Bergkvist and Rossiter, 2007) which we maintained as it is.

### 3.5 Variables

The dependent variable has been considered as following: the tourism and sustainable tourism. This dependent variable has been measured by the use of the Likert scale: strongly disagree, disagree, neither agree, nor disagree, agree, and strongly agree.

The independent variable has been considered as following: the new technologies and it has been also measured by the use of the Likert scale: strongly disagree, disagree, neither agree, nor disagree, agree, and strongly agree.

### 3.6 Typology of the Questions

As for the type of the questions, we are going to divide them into two groups: the first one will be based on the macro environment and the second one will be based on the micro environment. We will also address our question in a way to answer the following impacts: 1—Impact on the region; 2—Impact of social media; 3—The economical impact. The question of the individual interview has been confirmed by a spokesperson of the municipality of Bkassine (Table 2).

**Table 2** The question used for the individual interview on the Macro and Micro Environment

Micro-environment/Macro-environment	
Do you agree that advertising the region on social media has a positive impact on tourism? (Q1)	Do you agree that advertising the region on social media has a negative impact on tourism? (Q2)
Do you agree that the description of the characteristics (ancient city, pine forest. . .) of the region on new technologies tools will have a positive impact on tourism? (Q3)	Do you agree that the description of the characteristics (ancient city, pine forest. . .) of the region on new technologies tools will have a negative impact on tourism? (Q4)
Do you agree that the economical subventions given by the municipality of Bkassine are enough to ensure a positive development of the tourism sector? (Q5)	Do you agree that the use of new technologies as online booking, social media or online feedback could help attract more tourists to the region? (Q6)
Do you agree that the infrastructure of the region is decent enough to ensure a positive image for the tourists that are visiting the region? (Q7)	Do you agree on the fact that the culture of the region should be more prepared to accept the different type of tourists visiting the region? (Q8)
Do you agree on the fact that the municipality is not using enough resources to develop its online community? (Q9)	Do you agree that the region of Bkassine is a sustainable touristic place? (Q10)

## 4 Results

The individual interview was created on the base of 10 questions, scaled upon the characteristics of Likert. It was also divided into two groups the macro and micro environment, and was targeting the following topics: social media, new technologies, cultural changes, sustainable tourism and economics. The scales used to convert the question was 1 for strongly disagree, 2 disagree, 3 nor disagree or agree, 4 agree and 5 strongly agree.

The results of the individual interview came as following Table 3:

We divided the questions into the categories they represent, social media, cultural changes, sustainable tourism and economics (Table 4):

The response rate on the questions according to the Likert scaling gave us a clear view on the impact that new technologies have on sustainable tourism and answered the research question. It was as following Table 5:

Following the results obtained through the individual interviews, we analyzed the interviews, obtained an answer for the research question, which is the impact of new technologies on tourism, and gathered information from a southern region in Lebanon called Bkassine. For the cultural change characteristics, we witnessed a high impact of none interest (nor agree or disagree), which is due to the cultural background of the Lebanese residents. As for the economical characteristics, we witnessed that there’s a high disagreement with the municipality of Bkassine in term of economical subventions which indicates that if the municipality is willing

**Table 3** Results of the individual interview

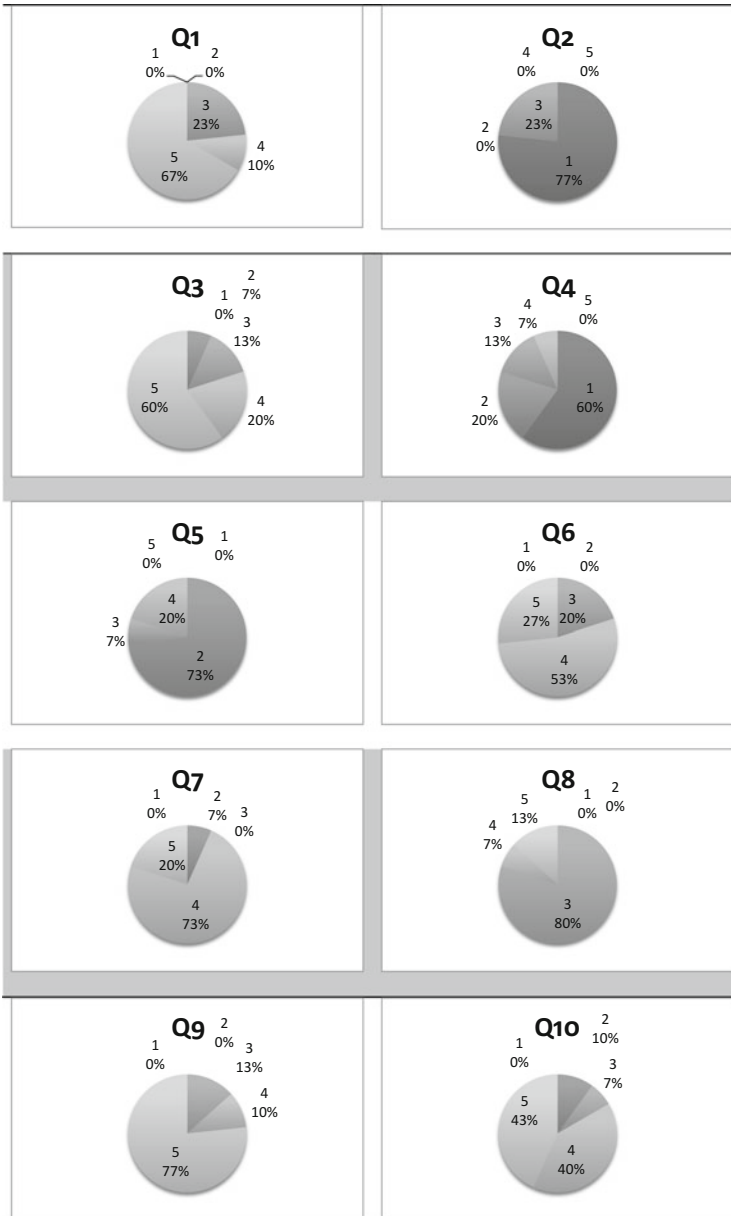
	1	2	3	4	5	Total
Q1	0	0	7	3	20	30
Q2	23	0	7	0	0	30
Q3	0	2	4	6	18	30
Q4	18	6	4	2	0	30
Q5	0	22	2	6	0	30
Q6	0	0	6	16	8	30
Q7	0	2	0	22	6	30
Q8	0	0	24	2	4	30
Q9	0	0	4	3	23	30
Q10	0	3	2	12	13	30

1 = SD, 2 = D, 3 = D/A, 4 = A, 5 = SA

**Table 4** Categories represented by the questions

Topics	Questions related
Cultural changes	Q8
Social media	Q1, 2 and 9
Economics	Q5 and 7
New technologies	Q3, 4 and 6
Sustainable tourism	Q10

**Table 5** Response rate and percentage



to hand more help in term of economical subventions, the region of Bkassine will have a better tourism sector. For the infrastructure, the interviewed individuals have shown that they do agree that the infrastructure is decent enough to reflect a positive image of the region. 25 out of 30 interviewed individuals have acknowledged the

fact that Bkassine is a region that is following the path of sustainable tourism. As for the Social media and new technologies, an average of 65 % of the individuals we interviewed have showed a high interest in term of the implication of the region of Bkassine in social media and new technologies and are willing to invest more on social media to advertise the region. In fact, they do believe that social media and new technologies are a gateway for a bigger yet better market place. And it's a place where they can describe and give a feedback about the region without any plagiarism of fake dream places.

## 5 Conclusion

This article has demonstrated that the impact of new technologies on tourism and sustainable tourism is enormous, along with the willingness of the region residents to activate themselves on social media or websites dedicated to tourism like trip advisor, in order to develop a better advertising campaign of the region. This willingness is the result of the major advantages that they are going to perceive as stakeholders, from an economical point of view for a better development of the infrastructure of the region to absorb a higher level of tourists in the upcoming years.

We have seen that the major impacts on tourism and sustainable tourism are mainly the results of this new era where new technologies are ruling the world. Social media has a huge advertising and marketing impact on any region that is willing to develop its touristic department.

The initial challenge of this paper was to create awareness in the future for regions in the Middle East that seek to develop a better image of the tourism sector in their countries, revolving around the use of new technologies that has a huge impact on macro and micro environments. In other words, it is about the use of social media in advertising the sites that could be visited by tourists, with advertising it locally as well.

The limitations of this article are that despite the useful findings of this article, we encountered some problems: First of all, every study or individual interview is based on the honesty of the respondents. We know by fact that we could encounter dishonest persons. Second of all, the data is collected via an individual interview, which could lead to erroneous information. The sample size was fair enough but not the best sample size to determine all the factors. Finally, the questions asked are limited to a few characteristics. Therefore, the future researches need to be piloted through a higher population in order to get a more critical and more precise answers, which automatically reduce the possibilities of having erroneous information or dishonest respondents. Besides, we can acknowledge that this article helped us to determine the true nature of new technologies in the tourism sector and moreover social media is able to help us developing and obtaining a better image of our tourism sector.

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# ICT Applications and Web 2.0 Components for Tourism in Protected Areas

Vicky Katsoni and Natali Dologlou

**Abstract** Ecotourism embraces the principles of sustainable tourism, concerning the economic, social and environmental impacts of tourism. The authors support the view that these principles must be continually audited and form the most important tools (regarding ICTs), for ecotourism. Therefore, a range of the academic reports were reviewed in order to derive the crucial information and to have a better overview of ICT-based tools/applications in all the dimensions of ecotourism. The results of the study in this conceptual paper reveal that the key ICT-based tools/applications for ecotourism recorded could be important tools to regulate the ecotourism development according to the each time needs in a particular area.

**Keywords** ICTs • Protected areas • Ecotourism • Tourism stakeholders • Framework • ICT tools

## 1 Introduction

Ecotourism is about managing a dynamically evolving process, which interacts and interrelates with the particular environmental, social, cultural, economic, political and technological features of each individual protected area. ICT can be particularly helpful in this respect. However, we believe that it is underrepresented in most research studies, and that ICT has not gained an important position as a key tool for achieving ecotourism goals in protected areas.

To this end, this paper offers a systematic framework, and sets a first basis for future research work on ICT solutions for ecotourism in protected areas. First, we provide definitions of key terminology, and review the literature related to ecotur-

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ism definitions, emphasizing its principles and stakeholders. Then, we describe our approach of ecotourism, as integrated tourism in theory and practice, and present our proposed conceptual ICT framework for ecotourism. Finally, we discuss our main findings and opportunities, and conclude the paper.

## 2 Literature Review

### 2.1 *Sustainable Tourism and the Path Towards Ecotourism*

Keeping a balance between economic growth and the protection of the environment is a challenge. To this end, most tourism professionals and the tourism industry currently focus on the development of so-called “sustainable tourism” (ST), trying to achieve the aims of economic development whilst protecting, preserving and enhancing the environment (Ali & Frew, 2014; Swarbrooke, 1999). The World Tourism Organization defines ST development as “the development that meets the needs of present tourists and host regions while protecting and enhancing opportunity for the future. It is envisaged as leading to management of all resources in such a way that economic, social, and aesthetic needs can be fulfilled while maintaining cultural integrity, essential ecological processes, biological diversity, and life support systems” (UNEP & UTNO, 2005).

As stated in the first Ecotourism Declaration in Quebec (2002), “ecotourism embraces the principles of sustainable tourism, concerning the economic, social and environmental impacts of tourism. It also embraces the following specific principles which distinguish it from the wider concept of sustainable tourism:

- (1) contributes actively to the conservation of natural and cultural heritage;
- (2) includes local and indigenous communities in its planning, development and operation, and contributing to their well-being;
- (3) interprets the natural and cultural heritage of the destination to visitors;
- (4) lends itself better to independent travelers, as well as to organized tours for small size groups.

Ross and Wall (1999) suggest an ecotourism framework which, if implemented and managed in an appropriate way, can help to achieve a balance between conservation and development through the promotion of synergistic relationships between natural areas, local populations and tourism. This balance is very sensitive: tourism may provide economic benefits for conservation and this relationship is unsustainable if visitors reduce the viability of local ecosystems through the disturbance of wildlife (Khah, Rao, & Khursheed, 2011; Lindsay, Craig, & Low, 2008). In addition, small group sizes and the restricted number of visits (required to ensure minimal ecological impacts and high quality experiences) also indicate that, unless prices are high, profits may be insufficient. In the long term, the inevitable profit motive will most likely tempt tour operators and the destination areas themselves to increase both the sizes and numbers of parties (Simmons, 1999). In the early '90s Wall, pointed out one more problematic issue of ecotourism: “By



definition, it is difficult to spend money in the wilderness! The result is that, with some notable exceptions, the local economic impact of ecotourism is likely to be small (1993)". Moreover, negative, socio-cultural impacts associated with local populations can be sometimes appear such as 'changes in value systems, traditional lifestyles, family relationships and individual behaviour or community structure', to name but a few (Anonymous, 2001a; Anton and Gines, 2002; Israngkura, 1996; Honey, 1999; Ratz, 2002; The International Ecotourism Society, 2002, as cited in Diamantis, 2004, pp. 16–17).

In the same way, Drumm and Moore (2005, p. 13) in their report for The Nature Conservancy suggest that ecotourism must follow specific elements in order to achieve an ecotourism initiative to be successful: "(1) have a low impact upon a protected area's natural resources; (2) involve stakeholders (individuals, communities, ecotourists, tour operators and government institutions) in the planning, development, implementation and monitoring phases; (3) respect local cultures and traditions; (4) generate sustainable and equitable income for local communities and for as many other stakeholders as possible, including private tour operators; (5) generate income for protected area conservation; and educate all stakeholders about their role in conservation".

More concretely, TIES (2015) suggested that ecotourism should be operationalised according to the principles: (1) minimize physical, social, behavioral, and psychological impacts; (2) build environmental and cultural awareness, and respect; (3) provide positive experiences for both visitors and hosts. (4) produce direct financial benefits for conservation; (5) generate financial benefits for both local people and private industry; (6) deliver memorable interpretative experiences to visitors that help raise sensitivity to host countries' political, environmental, and social climates; (7) design, construct and operate low-impact facilities; (8) recognize the rights and spiritual beliefs of the Indigenous People in your community and work in partnership with them to create empowerment.

However, besides the differences in principles and characteristics found in the literature, Fennell (2001), argues that in an analysis on 85 ecotourism definitions these definition had commons main pillars: (1) reference to where ecotourism occurs, e.g., natural areas, (2) conservation, (3) culture, (4) benefits to locals, and (5) education.

At a first look, ST seems quite suitable for PAs, especially if contrasted to general tourism. However, a number of related studies raise questions about the feasibility of ST. It's been 15 years now that Diamantis & Ladkin (1999) argued that "the concept of sustainable tourism is subject to a crisis" (p. 37), while Berno & Bricker (2001) supports that ST is a myth and that it is impossible to promote tourism while maintaining a good quality environment at the same time.

The estimated growth of future emissions from the tourism industry, despite potential technological improvements, is one of the most significant contributing factors to tourism being regarded as unsustainable (Gossling, Hall, Peeters, & Scott, 2010). In his analytical study for ST, Hall (2011, p. 1) notes that "ST is simultaneously a policy failure given the continued growth in the environmental impacts of tourism in absolute terms". As Daly (2008, p. 2) argues, "the growth economy is

failing. In other words, the quantitative expansion of the economic subsystem increases environmental and social costs faster than production benefits, making us poorer not richer, at least in high-consumption countries". Thus, some researchers have come to believe that, "the real benefits of biodiversity, and the costs of its loss, need to be reflected within economic systems and markets" SCBD (2010, p. 12).

It is clear that environmental policy failure is the one that most researchers blame for the failure of ST implementation. But there is more. Cultural heritage loss, by the invasion of foreign habits, fashions and elements it is also a failure of ST, even if not documented as widely as environmental degradation issues. "The degree to which the diversity of the world's ecosystems is linked to the diversity of its cultures is only beginning to be understood. . . . In the absence of an extensive and sensitive accounting of the mutual influences and effective policies targeting these issues, endangered species, threatened habitats, dying languages and vast knowledge bases are being lost at rates that are orders of magnitude higher than 'natural' extinction rates" (Pretty, 2008). Moreover, according to Petropoulos (2005), ST ignores regional and social inequality and technological progress. An additional reason for the failure of ST is that policy-makers are not able to follow the rapid changes in the environmental, economic, social, political, technological conditions; this in turn creates a significant lag for the corresponding changes in policy measures, making them ineffective.

Sharpley in his comprehensive paper "The Myth of Sustainable Tourism" (2010) believes that ST is not possible in practice and that the concept is only a myth. As a solution, he suggests the concept of destination capitals. "That is, all tourist destinations possess to a greater or lesser extent a variety of capitals, such as environmental capital, human capital, socio-cultural capital, economical capital and political capital. These capitals may be exploited by the destination in ways which meet the need for environmental sustainability (as defined by the destination) which reflect local developmental objectives and which take advantage of opportunities offered by the external market".

## ***2.2 ICT for Ecotourism in Protected Areas***

Information Technology is increasingly becoming critical for the competitive operations of the tourism and hospitality organizations as well as for managing the distribution and marketing of organizations on a global scale (Law, Leung, & Buhalis, 2009). There have been three main innovation waves impacting the tourism scenario in recent decades: (1) the development of the Computer Reservation System (CRS) in the 70s; (2) the development of the Global Distribution System (GDS) in the 80s; (3) the Internet in the 90s (The European e-Business Market Watch, 2013, p. 12). Due to the Internet, the entire process of developing, managing and marketing tourism products and destinations are under transformation, which empowers the interactivity between tourism enterprises and consumers

to unprecedented levels (DANTE, 2014). Modern ICT is closely linked to Web 2.0, which covers a wide range of interactive, dynamic applications allowing for exchange and cooperation between users (Henning, Vogler, & Moller, 2013; Zew, 2010), which are used to a growing extent by society through smart phones, tablets and other digital devices.

### ***2.3 Implications from the Literature Review***

Ecotourism principles must be continually audited for successful ecotourism, examples of which were listed in the previous section, named either as ecotourism goals or Fennell's main pillars (2001) or opportunities. These principles were then adopted by the authors to create categories for ecotourism ICT-based tools/applications.

Looking at the analysis of ecotourism definition and principles, it is understood that ICT-based tools/applications with the potential to be used in a PA must mainly derive from five tools-tanks (1) the ICT-based tools/applications used by the mainstream tourism sector and (2) the particular ICT-based tools/applications used by sustainable management and ST. (3) the particular ICT-based tools/applications used for environmental management and conservations processes (4) the particular ICT-based tools/applications used for educational/interpretation processes (5) the particular ICT-based tools/application used for participatory policy making and governance. Of course ICT non ecotourism related are or should be applied in the PA in order to facilitate every day's life and local needs.

## **3 Methodology**

The authors support the view that ecotourism principles, analysed in the previous section, should be examined and form the most important tools (regarding ICTs), for ecotourism. However, the categorization of capitals to economic, environmental, social, cultural, political and technological of the area is artificial, as they are interrelated. Furthermore, even if we use them as factors to register ICT-based solutions, they would reflect in best case sustainable tourism rather than the specific goals of ecotourism. Therefore, they cannot be key factors in this ICTs registry. We consider local community (LOCOM), PA managers and staff (PAMAN), travelers (TRAV) and other local stakeholders (OLST) e.g., ecolodges owners, as the main categories of ecotourism stakeholders. Users and examples of ICT-based tools/applications proposed are indicative. (Abbreviations above in parenthesis were used in the ICT-based tools/applications recorded.)

A range of the academic reports were reviewed in order to derive the crucial information and to have a better overview of ICT-based tools/applications in all the dimensions of ecotourism. The literature research was made via the web, using

different combinations of relevant keywords, such as: protected areas; ecotourism, sustainable tourism, impacts, ICT applications, eTourism, information management, information system, intelligent applications, management, software, technology, environment, culture, society, economy, policy makers, tools management, visitors, local communities, indicators, monitoring and natural resources (as well as for a number of synonyms). The language was limited to English and Greek. However the majority of the ICT applications found were not explicitly reported for use in ecotourism, we included in our study every application that seemed relevant.

It must be recognized that the related studies of Franklin and Hosein (2009), which was a one table slide with the title: A sample of ICT interventions that have the capacity to contribute to SCD and Ecotourism and these comprehensive studies of Ali and Frew (2009, 2010, 2014) on ST ICT-based tools/applications, where the most helpful and relative to our subject between our findings. In addition the related work of Henning et al. (2013): Use of Modern Information and Communication Technology in Large Protected Areas was helpful to get information regarding web.2 and modern ICT applications in PAs.

## 4 Results

The following Table 1 presents the results of our study and reveal that the key ICT-based tools/applications for ecotourism recorded could be important tools to regulate the ecotourism development according to the each time needs in a particular area.

The above structure can help decision support systems' managers (DSS) in PAs to develop multiple themes or criteria to be considered in regional planning, by including traditional land use, land ownership, climate, topography, geology, expert knowledge of environmental systems and socio-economic conditions and incorporate expert knowledge for decision-making.

As Michael Hall argues "increased focus needs to be given to the formulation of the goals, institutional arrangements, instruments and evaluation of ecotourism policy if it is to become more effective in meeting the needs and aspiration of the local communities that it is meant to assist, rather than the consultants, policymakers and boosters who are often its uncritical proponents" (2004, p.147). New terms as Geocaching (an outdoor recreational activity, in which participants use a Global Positioning System (GPS) receiver or mobile device and other navigational techniques to hide and seek containers, called "geocaches" or "caches", anywhere in the world) or Geotagging (the process of adding geographical identification metadata to various media such as a geotagged photograph or video, websites, SMS messages) should be incorporated in the PA's marketing plan. Open source platforms for developing location based games (LBG). An example is ARIS. There are many ways to create a LBG, either use DIY techniques or experiment with the free game design platforms (INVOLEN, 2014). As Reid,

**Table 1** Keys ICT-based applications for ecotourism in protected areas

Opportunities	Ecotourism goals	ICT-based tools/applications and web.2 components
Ecotourism destination	PA recognition as an ecotourism destination	<p><b>PAMAN:</b> GIS; GPS; CS; VT; WLAN; SM; create website; Google earth; dynamic web maps; static web maps; Open source platforms for developing LBGs; photos; 3D images; video; online real time views; route mapping; geotagging; participation to newsletters; e-guides</p> <p><b>LOCOM:</b> GPS; GIS; SM; Google earth; dynamic web maps; static web maps; upload photos; video; route mapping; geotagging; participation to newsletters; e-guides</p> <p><b>TRAV:</b> GIS; GPS; VT; WOM; SM; websites; newsletters; e-guide; route planner; Google earth; dynamic web maps; static web maps; LBGs; photos; 3D images; video; online real time views; route mapping; geotagging; trip planning process via the www; visit ecotourism networks websites; newsletters; e-guides</p> <p><b>OLST:</b> GIS; GPS; CS; DMS; LBG; WLAN; GDS; SM; create websites; online destination networks;; Google earth; dynamic web maps; static web maps; upload photos; video; online real time views; route mapping; geotagging; participation to newsletters; e-guides</p>
Conservation	<p>Sustainable use of resources;</p> <p>Biodiversity conservation;</p> <p>Educate all stakeholders for conservation;</p> <p>Generate income for PA conservation;</p> <p>Actively contribution to the conservation;</p> <p>Lends itself better to independent travellers, as well as to organized tour for small size groups</p> <p>Deliver memorable interpretative experiences to visitors that help raise sensitivity to host countries' environmental climates;</p>	<p><b>PAMAN:</b> GIS; DMS; EMIS; LBS; TIS; CS; WCOFCFS; VT; ITS; SM; ecotourism networks websites for parks; 3D images; video; online real time views; route mapping; geotagging; virtual tours; electronic visitor counting; camera records; create Game-based learning apps and games targeting in natural conservation;; on line education; distance learning programs, webinars for conservation</p> <p><b>LOCOM:</b> CI; DMS; LBS; VT; VLE; LBG; SM; GPS; Google earth; dynamic web maps; static web maps; photos; video; route</p>

(continued)

**Table 1** (continued)

Opportunities	Ecotourism goals	ICT-based tools/applications and web.2 components
	<p>Interprets the natural heritage of the destination to visitors</p>	<p>mapping; geotagging; virtual tours; on line education/ distance learning programs and webinars for conservation  <b>TRAV</b>: CI; DMS; LBS; VT; WOM; VLE; SM; GIS; GPS; LBG; websites; newsletters; e-guide; route planner; Google earth; dynamic web maps; static web maps; photos; 3D images; video; online real time views; route mapping; geotagging; virtual tours; Game-based learning apps targeting in natural conservation  <b>OLST</b>: GIS; DMS; EMIS; LBS; TIS; CS; WCOFCS; VT; ITS; CI; ERP; VLE; SM; GIS; GPS; LBG; create websites; online destination networks; Google earth; dynamic web maps; static web maps; photos; 3D images; video; online real time views; route mapping; virtual tours; geotagging; participation to newsletters; e-guides; learn and share information for do and don't in the PA; on line education/ distance learning programs, webinars for conservation;</p>
<p>Culture</p>	<p>Minimize physical, social, behavioural and psychological impacts;                      Build cultural awareness and respect;                      Actively contribution to the cultural heritage conservation;                      Interprets the natural and cultural heritage of the destination to visitors                      Deliver memorable interpretative experiences to visitors that help raise sensitivity to host countries' political, environmental and social climates;</p>	<p><b>PAMAN</b>: CI; DMS; LBS; VT; VLE; SM; upload 3D images; video; online real time views; route mapping; cultural virtual tours; camera on sight records; create Game-based learning apps and games targeting in cultural conservation;  <b>LOCOM</b>: CI; DMS; LBS; VT; VLE; SM; GPS; Google earth; dynamic web maps; static web maps; photos; video; route mapping; geotagging; virtual tours; on line education/ distance learning programs and webinars for culture heritage conservation  <b>TRAV</b>: CI; DMS; LBS; VT; WOM; VLE; SM; GIS; GPS; websites; newsletters; e-guide; route planner; Google earth; dynamic web maps; static web maps;</p>

(continued)

**Table 1** (continued)

Opportunities	Ecotourism goals	ICT-based tools/applications and web.2 components
		<p>photos; 3D images; video; online real time views; route mapping; geotaging; virtual tours; game-based learning apps targeting in cultural conservation;  <b>OLST</b>: CI; DMS; LBS; VT; VLE; SM; GIS; create websites; online destination networks; GPS; Google earth; dynamic web maps; static web maps; photos; 3D images; video; online real time views; route mapping; virtual tours; geotaging; participation to newsletters; e-guides; on line education/ distance learning programs and webinars for cultural conservation</p>
Education	<p>Build environmental and cultural awareness and respect  Interprets the natural and cultural heritage of the destination to visitors  Educate all stakeholders about their role in conservation</p>	<p><b>PAMAN</b>: CI; DMS; LBS; VT; MCTs; create/use/shares educative video; audio files; create game-based learning apps and games targeting in natural and cultural heritage conservation; on line education/distance learning programs, webinars, for management of Pas; webinars for improving skills on ICTs  <b>LOCOM</b>: CI; DMS; LBS; VT; MCT; VLE; on line education/ distance learning programs and webinars for natural and cultural heritage conservation; game-based learning apps and games targeting in natural and cultural heritage conservation; webinars for improving skills on ICTs  <b>TRAV</b>: CI; DMS; LBS; VT; WOM; VLE; website; virtual tours; static web maps; interactive web map; GIS; educative videos; geocatching; game-based learning apps targeting in natural and cultural conservation; WOM  <b>OLST</b>: CI; DMS; LBS; VT; MCT; VLE; on line education/ distance learning programs and webinars for natural and cultural conservation; webinars for improving skills on ICTs</p>

(continued)

**Table 1** (continued)

Opportunities	Ecotourism goals	ICT-based tools/applications and web.2 components
Benefits to ecotourism stakeholders	Provide positive experience for both visitors and hosts Generate financial benefits for both local people and other stakeholders Recognize the rights and spiritual belief of the indigenous people in your community and work in partnership with them to create empowerment	<b>PAMAN:</b> EIAS; DSS; DMS; CI; CS; GIS; WLAN; SM; MCTs; CMCs; blog; forum; e-government; online evaluation; visual broadcasting of working conditions; internet banking; ICTs for energy efficiency; eco-ICTs <b>LOCOM:</b> EIAS; DSS; DMS; CI; CS; GIS; SM; MCTs; CMCs; blog; forum; e-government; online evaluation; visual broadcasting of working conditions; internet banking; Tele-health/Telemedicine <b>TRAV:</b> WOM; e-souvenirs shops; watching visual broadcasting of working conditions; <b>OLST:</b> EIAS; DSS; DMS; CI; CS; GIS; WLAN; CRM; MCTs; CMC; blog; forum; SM; e-government; online evaluation; visual broadcasting of working conditions; internet banking; Tele-health/Telemedicine; virtual business clusters; ICTs for energy efficiency; eco-ICTs;
Abbreviations		
CI Community Informatics CMC Community Multimedia Centers CRM Customer Relationship Management CS Computer Simulation DMS Destination Management System DSS Decision Support Systems EIAS Economic Impact Analysis Software EMIS Environment Management Information System ERP Enterprise Resource Planning	LBG Location Based Games LBS Location Based Services MCT Multipurpose Community Telecentres SM Social Media TIS Tourism Information System VLE Virtual Learning Environment VT Virtual Tourism WCOFCS Weather Climate and Ocean Change forecasting Software WLAN Wireless Local Area Networks WOM Electronic Word Of Mouth	<b>LOCOM</b> Local Community <b>PAMAN</b> PA Managers and Staff <b>TRAV</b> Travelers <b>OLST</b> Other Local Stakeholders

(continued)



**Table 1** (continued)

Opportunities	Ecotourism goals	ICT-based tools/applications and web.2 components
GDS Global Distribution System GPS Global Positioning System ITS Intelligent Transport System		

Wearing and Croy (2008), argue, “the likely importance of national parks’ websites as hubs of the organisations’ marketing and communication cannot be overstated. The website should play a significant role in building and enhancing visitor relationships with national parks”.

## 5 Conclusions

Introducing and/or enhancing technological involvement, especially in remote PAs and their communities is a necessary and unavoidable task, especially when there is limited or no access to ICTs by local stakeholders. This conceptual paper sets a systematic framework and forms a basis for future research work on ICT solutions for ecotourism in protected areas. This study considers local community (LOCOM), PA managers and staff (PAMAN), travelers (TRAV) and other local stakeholders (OLST) e.g., ecolodges owners, as the main categories of ecotourism stakeholders and proposes examples of ICT-based tools/applications. This research has the further goal to assist all the above mentioned ecotourism stakeholders to select the appropriate ICT tools, based not only on the particular developmental needs of their area, but also on aspects that cover their environmental, social, cultural, economic, technological, and political reality.

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# Cultural Tourism Destinations and the Power of Virtual Reality

Spiros Polimeris and Christine Calfoglou

**Abstract** The immersion properties of digital culture and its all-engulfing effects have been repeatedly underlined in the literature (see Polimeris & Calfoglou, *Art in the globalised era: A disembodied journey with traces in the past*. In V. Katsoni, (Ed.), *Cultural Tourism in a Digital Era*. First International Conference Iacudit Athens, 2014 (pp. 59–79). Heidelberg: Springer for an overview, 2015a). The way these properties interfere with the subject's perception of space and time has also been considered. This paper attempts to shed some further light on the potency of the digital medium and, more specifically, of virtual reality, by conducting a small-scale research, comparing the effects of diverse modes of presentation of the cultural tourism product on respondents' choice of a cultural tourism destination. In other words, it explores the presentation mode as a motivation force underlying people's statement of preferences (cf. Powell & Kokkranikal, *Motivations and experiences of museum visitors: The case of the Imperial War Museum, United Kingdom*. V. Katsoni (Ed.) *Cultural tourism in a digital era*. First International Conference Iacudit Athens, 2014 (pp. 169–181). Heidelberg: Springer, 2015). The powerfulness of this force is tested against variables such as the type of destination, destination popularity and respondents' cultural background. The power of the virtual is once more established and any correlation with the destination's popularity, its 'aura', as well as with respondents' cultural background is explored. The results are discussed in light of virtual reality discourse as dominant, an instrument and a product of power (Foucault, *L'archéologie du savoir*. Paris: Gallimard, 1969; Foucault *Power/knowledge*. In C. Gordon (Ed.), London: Harvester, 1980), its non-linear organizational principles and its affective dimensions (Massumi, *Parables for the virtual: Movement, affect, sensation*. Durham, NC: Duke University Press, 2002). While these results can be made to inform cultural tourism programmes quite fruitfully, the question is posed of whether the virtual may eventually override the in situ experience.

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**JEL Classification** Z

## 1 Introduction

“There are various reasons why adding a Virtual Tour to your (online) marketing can improve your business. In general these benefits rely on the fact that 360 degree panoramic photography greatly enhances location and product understanding and improves marketing through *visualisation*”<sup>1</sup>. This comment, among several others in the tourism advertising business, points to the advantageous visualization possibilities granted by virtual reality demonstrations. These possibilities have also been considered in relation to art and culture (see Polimeris & Calfoglou, 2015a, for an overview) and emphasis has been placed on the results of immersion incurred by Virtual Reality (henceforth VR) as well as on the disembodiment accruing there from. Importantly, digital art and culture have been referred to as involving a radical change in the subject-viewer’s sense of space and time and the way panoramas have acted as a precursor has also been considered (ibid.). Through the small-scale study we report upon in this paper, we attempt to shed some hands-on light on the issue of subjects as cultural tourism destination choosers and on the degree to which their choice is influenced by the mode of presentation. On the assumption that, as suggested in a number of tourist sites in relation to commercial commodities in particular, “virtual tours have a higher impact on average visitors’ decision than pictures and even videos”<sup>2</sup>, we set out to explore the potency of VR as against brochures and websites in relation to potential visitors’ choice of a destination, a city or a museum. We also consider potential correlations between this potency and some other variables, like the level of destination popularity or subjects’ cultural level. In accounting for the relative potency of VR, we draw upon Foucault’s (1969, 1980) discourse theory as well as on the notion of ‘affect’, treated as distinct from emotion, as in Massumi (2002), among others.

The paper is laid out as follows: We first present the relevant theoretical framework, then describe our data collection methodology and, finally, we discuss the results obtained and pit the relative potency of the medium against the ‘reality’ of the destination itself. Our work ends with some reflections on the issue of the ‘trap’ laid by the place image built round the VR mode of presentation.

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<sup>1</sup> VirtualVisitBali.com, accessed on March 16th 2015.

<sup>2</sup> <http://www.giraffe360.com/en/how-360-virtual-tour-can-influence-hotel-customer-decision-making>, accessed on March 15th 2015.

## 2 Virtual Tours: Articulating a Powerful Discourse

One's perception of a place, one's image of it has been found to be crucial in deciding whether to visit the particular destination [see, for instance, discussion in Selby and Morgan (1996)]. This image is evidently largely dependent on the mode of presentation (see Pyke, 2013, for a discussion). In the case of a place image formed by means of a virtual tour, for instance, one would expect a much richer texture, since the medium provides almost full experience of the destination. Research has pointed to the significance of the element of control over the demonstration process, interactivity, response speed (see, e.g., Yu, 2013). No matter what, the immersion possibilities inherent in the virtual-digital world seem to hold a special lure.

This lure may be closely intertwined with the notion of 'affect', which, according to a number of researchers, should not be identified with emotion. In the Wikipedia definition, 'affect' "can mean an instinctual reaction to stimulation occurring before the typical cognitive processes considered necessary for the formation of a more complex emotion". If affect is pre-cognitive, it must be a more 'primitive' form of response than emotion. For Tomkins, affects are "non-intentional, bodily reactions" (Leys, 2011, p. 437). There is, thus, a "disjunction between what our emotions on the one hand and what causes them on the other, (since) . . . affect and cognition are two separate systems" (ibid.) (see also Tomkins, 1962–1963, 1: 248). Unlike emotion, then, which is woven in with cognition, affect is apparently (though there are several arguments to the contrary) a more instinctive reaction, which makes it particularly relevant to our discussion of the digital avalanche. In a world where the body loses its substance and is transferred weight-free into a world that simulates reality, the subject's affect may be tapped more directly than emotion. Where time and space are literally annihilated, where a new topos is apparently founded (see Polimeris & Calfoglou, 2013, 2015b), the subject may seem to be incapable of performing cognitive operations. This ties in quite nicely with Tomkins's suggestion that "there is a radical dichotomy between the 'real' causes of affect and the individual's own interpretation of these causes" (1962–1963, 1: 248). In the immersive, all-engulfing process of the virtual tour, affect is subject to forces that the individual rationalizes at a later stage, probably without much success. As we will see in the discussion of our data below, there is a distinct possibility that subjects may not be aware of how the virtual element has affected their choices.

The power of affect in relation to a VR environment is underlined by the 'subterranean', the overwhelming yet subconscious forces that act upon the human body and mind in their interaction with the 3D digital world. As we have argued elsewhere (Polimeris, 2011, 2013, Polimeris & Calfoglou, 2015a), the power of the medium and the devouring 3D environment is most impressive. According to cultural critic Eric Shouse (2005), "the importance of affect rests upon the fact that in many cases the message consciously received may be of less import to the receiver of that message than his or her nonconscious affective

resonances with the source of the message” (in Leys, 2011, p. 435). This underscores the significance of non-conscious processes at work when engaging in a virtual tour. As pointed out by affect cultural critics, “the body not only “senses” and performs a kind of “thinking” below the threshold of conscious recognition and meaning but—as we shall see in a moment—because of the *speed* with which the autonomic, affective processes are said to occur, it does all this before the mind has time to intervene” (ibid., p. 450). Acknowledging this may lead us to hypothesise a relatively strong effect of the virtual mode of presentation on subjects’ decision-making, in our case with regard to a cultural tourism destination. If the virtual indeed possesses the sweeping power hypothesized, it could be said to possess the “nonsignifying, nonconscious “intensity”” attributed to affect by Massumi (2002), and disjoining it from the “subjective, signifying, functional-meaning axis to which the more familiar categories of emotion belong” (ibid., p. 441) would be necessary. Affect is “always just beyond the control threshold of the subject—the subject is “traversed by” but doesn’t “possess” affect” (Shaviro, 2010, p. 3). We may thus be dealing not exactly with subjects interacting with the 3D environment but, instead, with a ‘global’ ‘reality’ which acts upon a somehow depersonalized group of individuals, some kind of a collective subconscious. We may have mentioned control over the medium as an advantage of virtual tours at the beginning of this section but this sense of control, though gripping, may well be deceptive.

The idea of control is related to the non-linear organization of the virtual tour narrative. As proposed in Lyotard (1984), this results from the substitution of images and space for narratives and history. Personal experience suggests that a virtual tour involves choice but, essentially, it is rather circular, giving you the feeling that you are trapped in the labyrinthine 3D space. On the other hand, the non-linearity of the process may be tantalizing, a kind of ‘disorderliness’ which reflects the ever-changing landscape of post-modernist thought and culture. In Horgan’s (2009, p. 8) words, “identity (may be seen) as a process of change, not something that can be fixed by any one grammar or system of constructed order”. And this is sealed by the untranslatability of the image into words (and the converse): “It is in vain that we say what we can see; what we see never resides in what we say” (Foucault, 1971, p. 9). We are in search of the points of interruption of the grand narrative, says Foucault (1969, pp. 10–11, our translation), stressing the discontinuity of post-modernist times, and of the nature of the powerful discourse that gives them shape. Such discourse is more than a sum of signs, of signifiers and signifieds, which is what makes it irreducible to language and speech (ibid., p. 67, translation ours). It is this type of discourse, we argue, that is involved in VR environments, incidences of interruption of the grand narrative themselves, with their ‘disorderliness’ and distinct spatiotemporal dimensions. The distinctness of these dimensions is connected with the “new forms of depth perception and stereoscopy” (Levitt, 2012), inherent in 3D simulations, all part of an avatar, ‘affect-driven culture’ (ibid.) targeting sensation.

That 3D discourse is more than a match of signifiers and signifieds is eloquently demonstrated in Parisi and Terranova’s (2001, p. 125) reference to “the relevant autonomy of digital images from regimes of representation and identification”. For

them, “an affective space (that of a virtual tour, in our case) is “post-linguistic and post-semiotic”, a field of forces, speeds and slownesses in which we do not know what a body is—or what a body can do—in advance” (see Levitt, 2012, p. 3). The statement concerns digital culture and art in particular, but we believe it could well be extended to subsume other types of virtual interaction, too.

The dominance of virtual discourse, its ‘post-linguistic’ power to shape objects, is best reflected in the way it manipulates the ‘real’ by intensifying the “material qualities of the image” (Parisi & Terranova, 2001, p. 124). The virtual reconstruction, rather than representation, of the object demonstrated, the digital image of the body-avatar, the work of art, the tourist destination in the case of the present study, attempts to “take over the real, to involve and overwhelm us to the point where we will no longer be able to discriminate between referent and sign” (ibid., p. 123). Form merges with content in a remarkably indissoluble way, shaping it anew in doing so. Corporeal immersion of the subject in the digital image adds to the subject body, thus transforming it in a way, which means that, far from being confined to exposure alone, the virtual experience is a formative one, a process and a product in the making, not a “structure but a structuralisation” (Schilder, 1978, p. 174).

On the basis of the arguments advanced so far, it appears that the discourse articulated by VR is dominant in the sense of enmeshing subjects in a new arena of signification as well as in Foucault’s (e.g., 1969) more extreme sense of exercising a power outside the bounds of which one cannot exist. Like discourses generally, it could be said to “constitute the ‘nature’ of the body, unconscious and conscious mind and emotional life of the subjects (it) seek(s) to govern” (Weedon, 1987, p. 108).

Intellectuals are also accountable to it (Brooker, 1999). On a more practical niveau, this could mean that subjects with a more advanced cultural level, also strongly enmeshed, would make decisions under the impact of the powerfulness of this discourse. In yet more practical terms, this would mean that the VR mode of presentation of a tourist destination in the present study would be equally robust across subjects, leading them to select virtual tour destinations as against those presented in the ‘traditional’ form of a brochure or, even, of a website. The degree to which this is true forms part of the issues explored in our research, as we will see in the next section. We will also see the degree to which this post-linguistic process may interact with the—linguistic—image of the destination already formed on the basis of its popularity as well as with its less or more directly cultural nature, namely with its city or museum identity.

### 3 Methodology

The main aim of the research reported upon in this paper is to explore the powerfulness and affective resonance of the VR discourse as reflected in the choices made by 36 respondents with regard to potential cultural tourism destinations. Respondents were all adults, their age ranging from 18 to 55. Their cultural



level was also expected to vary as their educational level varied, too. The data was collected through completion of a questionnaire composed of ten questions. Six of the questions required respondents to pick one destination out of three. The destinations in each question were presented differently: one in the form of a brochure, one in the form of a website and one in the form of a virtual tour, and the order of the destination mode of presentation across questions varied, to eliminate possible pattern effects. It was assumed that respondents would be influenced in their decision by the mode of presentation, even if, as we will explain below, they were not aware of this effect, as revealed in their answer to the open-ended questions that followed. These six questions were composed of two subsets of three: one subset involving cities and a second subset involving purely cultural tourism destinations, namely museums. The distinction was made to explore potential differences in VR effects between subjects' choice of a tourist, a city, and a most markedly cultural tourist destination.<sup>3</sup> Within both question sets of three, there was a stratification involving different levels of popularity. Thus, the questions in each set were made to include destinations seen as of progressively increased popularity: there were three low popularity destinations, followed by three medium popularity and another three high popularity ones and this distinction was made both for cities and for museums with a view to exploring the potential interference of the popularity element with VR effects.

Besides these six questions described, there were another four, which involved the following: the two were open-ended and required stating which of the destinations provided in the previous set of questions, namely cities or museums, respondents would most readily visit and explaining why. This aimed to examine whether respondents were aware of the effects of the mode of presentation on their choice. Of the last two questions, one involved demographic data and the other one putting a tick against those of the 21 museums listed that they had heard of. On the assumption that subjects' cultural level could be determined by the number of ticks in the specific question, we postulated the following three categories: 1–7 ticks corresponded to a low cultural level, 8–13 to a medium one and 14–21 to a high cultural level. This, we believed, would help us calculate possible correlations between respondents' cultural level and their choice of a destination, as determined by the mode of presentation. In other words, it would give us some insight into whether 'intellectuals', referred to in the previous section as subject to the dominant discourse, too, could single themselves out, forming a separate cultural tourism group.

To sum up, we had three independent variables, namely the type of destination—city or museum—, the level of popularity—low, medium, high—, the respondents' cultural level, and one dependent variable, namely the presentation mode, with three possible values, as explained above. The questionnaire was available online and respondents clicked each city or museum button and saw the website or the

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<sup>3</sup> Both destinations are treated as cultural tourism ones, in the sense that Rome, for instance, included among the destinations, is culturally fraught, but museums were seen as purely cultural.

virtual tour presentation. The brochure was handed out to them. They then ticked the relevant space in the questionnaire hard copy. The results were subjected to quantitative analysis, though some qualitative analysis was reserved for the open-ended questions.

Our hypotheses were as follows:

- The overall score achieved by virtual tour choices would override that of the other two modes of presentation, namely the brochure and the website
- The virtual mode of presentation might be more dominant among city destinations than among cultural tourism ones, where the aura of the museum might be a strong determinant.
- Similarly, the popularity of the destination might affect results by giving stronger VR effects in the case of less popular destinations, unlike what might happen in popular destinations, possessing a special aura.
- A higher cultural level might lead to reduced susceptibility to VR effects in choosing a destination.

## 4 Results and Discussion

Overall, the virtual mode of presentation outperformed the other two by far. Of a total of 214 responses, for both cities and museums, virtual tours got 54 % while the brochure and the website only got 23 % each. Evidently, the virtual had an advantage over the digital alone. These results are graphically presented in Table 1:

Our hypothesis regarding overall VR effects was thus confirmed. On the other hand, differences between cities and museums in terms of mode of presentation seemed to be insubstantial, virtual tour choices amounting to 56 % and 52 % respectively. This suggests that the presentation mode was stronger than the aura museums, like Rijksmuseum in Amsterdam, for instance, carried. Interestingly, however, the qualitative data we obtained with regard to respondents' choice of a destination they would visit most promptly as well as their reasons for doing so revealed that responses stating that the mode of presentation was most influential were distinctly few. This testifies to the suggestion made earlier that, while making the 3D choice, a number of respondents do not seem to be aware of the powerfulness of the medium.

Let us now see what happens with the popularity variable. As suggested earlier, we had assumed that, in the case of less popular destinations, subjects might be led to select the city or museum presented in the form of a virtual tour, as they wouldn't

**Table 1** Overall number of responses for presentation mode

Brochure	23 % (50)
Website	23 % (50)
Virtual tour	54 % (114)
Total	100 % (214)

be under the impact of the destination's reputation. Indeed, 'reputation' was one of the reasons given for their choice but, again, there was no consistency in the use of the word. The results for this variable were interesting, in so far as the differences observed generally between the occurrence of VR and its 'rivals' were blunted in the high popularity city group. In the high popularity museum set, the differences were again reduced. Indeed, non-parametric, chi-square analysis revealed that differences were significant at the 0.05 level in all cases except those of highly popular cities, like Paris, Rome or Barcelona, and highly popular museums, like the Louvre, the Hermitage or the Smithsonian. This is evidence for the relative strength of the popularity variable in relation to the mode of presentation in selecting a destination. In other words, as hypothesized, when the 'aura' of a place, in Benjamin's (1936/1968) sense of the uniqueness of an object of perception, is particularly vibrant, the mode of presentation becomes a less important determinant in respondents' choice. The linear, non-replicable brochure mode gains popularity over the non-linearity and the replicability of the digital or the virtual, as a result. Though the present study is a small-scale one and further evidence is needed for safer conclusions to be drawn, such information may need to be taken into account in promoting tourist and cultural tourism destinations.

Finally, with regard to potential cultural level effects, descriptive crosstabulation statistics revealed no systematic correlation between respondents' cultural level and mode of presentation. In other words, subjects in the high cultural range did not opt for the non-virtual, as might have been expected, if, intellectuals were not, in Foucault's terms, also dominated by discourse. Virtual tours thus had a more or less uniform effect across subjects.

The data presented above points in the direction of VR discourse exercising particular power over people's decision-making, quite independently of the cultural focus of the destination. Immersion apparently works on people's affect, which, being pre-cognitive, as argued earlier, eludes consciousness; hence, respondents' account of why they would choose to visit a specific destination. Few of them acknowledge its effect. If motivation to visit a cultural tourism destination can be extrinsic, that is "external to the (subject)", or intrinsic, that is "linked to the perceived usefulness (or pleasure) of the visit" (see discussion in Powell & Kokkranikal, 2015, p. 171), then we could argue that the virtual tour medium is internalized, modifying one's perception of one's self in relation to the destination to be visited, and thus becoming in some way intrinsic, a bit as in the age-old McLuhan (1964) motto "The medium is the message".

This is not the whole picture, however. First of all, we have seen the blunting of VR effects in the high popularity destination set. This blunting indicates that would-be visitors' image of a place can be formed on the basis of perception prior to exposure to its 3D replication. Moreover, as can also be seen in Table 1, the incidence of brochure or website selection is not insubstantial. Focussing on the brochure mode of presentation in particular, it appears that, despite, or, rather, parallel to VR dominance, we also have some support for linearity as a preferred mode of presentation in several cases. It would be tempting to suggest, along with Eckermann (1995), that Foucault's 'docile' self, trapped in the dominance of the

specific type of discourse, may alternate with the philosopher's 'active' self (emerging in his later writings), which places the self, and the body in our case, in a position of agentivity in relation to the presentation tool. In the case of the brochure, this may well be a position of equity in relation to the text, with which the subject interacts by bringing forward related prior knowledge. This, we would argue, is a more 'democratic' process than the immersion one, despite the façade of autonomy and democracy allowed the individual through the multiplicity of inspection possibilities in the virtual tour.

Being a domain of power, VR discourse is, according to Foucault's (1980) arguments concerning discourse, a domain of knowledge and, as such, also a domain of truth, for "truth isn't outside power" (Hall & Gieben, 1992, p. 295). It's the power of the medium over the body, the mesmerizing effect of disembodiment and the truth of simulated reality. Perhaps, as suggested in Baudelaire in his text on photography as a simulation of reality (Blood, 1997, p. 161), the conflict between the digital and the non-digital, the virtual is an "opposition between art and industry—(an) opposition between the taste for the beautiful and the taste for the true". This truthful representation of reality may be binding and enslaving in a way the real isn't.

If there is a practical danger arising there from, it is twofold. One, the aesthetic experience of our perception of a place may be thwarted. Two, and this is particularly relevant to cultural tourism policies, it would be interesting to see what happens when people actually visit the virtually 'promised land'; will they still be impressionable or will they experience the 'avatar blues' reported upon in Jo Piazza (see Levitt, 2012, p. 8), comparing the excitement of the virtual reality space with the 'limitations' of the real space, a comparison that may be tipped on the side of VR? This would seriously undermine the cultural tourism goal. According to Yu (2013, p. 276), "a tourist's decision to travel to a particular destination is linked to the destination image held by that tourist and . . . satisfaction largely depends upon a comparison of expectations based on previously held images and the actual reality encountered at the destination". Tourist policies therefore need to take such intuitions into account in building such an image.

## 5 Concluding Remarks

In this paper we have elaborated on the powerfulness of VR discourse in leading to decision-making regarding cultural tourism destinations. Our data has shown that VR is indeed a dominant presentation type, if compared to the digital alone and to the printed word, since the majority of decisions in our small-scale study involved a destination presented virtually. On the other hand, though with less affective impact, websites and brochures still help with decision-making. It would be interesting to see if our results gain further support in a larger sample, perhaps spanning the non-adult population, too. The complication of a mismatch between place

image and expectations on the one hand and the place itself also needs to be carefully considered.

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# Running on Heritage, a Conceptual Discussion on the Roles of Heritage Trails and of Augmented Reality on Amateur Runner Athletes

D. Gavriili-Alexandris and Ph. Vakalakis

**Abstract** This conceptual discussion focuses on the amateur athletes (runners) when participating in distance races (long runs) that are set in places of heritage significance. Its purpose is to identify whether there might be common areas of sport, heritage, connectedness and psychological distance, as these blend with the experience of the amateur athlete during long runs. Connections between elements such as memory, identity, legacy and sport are being examined from the amateur athlete's point of view. An attempt is made to draw a parallel between the visitor and the athlete. Moreover, this paper examines whether the amateur athlete's experience is further enhanced through augmented reality. The introduction of augmented reality, a software term for location-based information delivered online, is expected to enhance human involvement and deliver a richer experience, as it is able to deliver related data to visitors in electronic form, during their visit. This paper examines whether the information provided by augmented reality creates a link to the heritage related ambience of the location, i.e. the heritage trail, in which case it may have an encouraging role to the amateur athlete's endeavor to finish the long run. Implementations, further considerations for research and limitations are also discussed.

**Keywords** Heritage • Sport • Tourism • Experience • Augmented reality • Long run

**JEL Classification** L83 • O14

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## 1 Introduction

The purpose of this conceptual discussion is to examine the role of heritage trails and the influence of augmented reality on the experience of the amateur runners of long distance races, before and during the race.

Distance races (long runs) are sports competitions that are situated in a variety of settings, ranging from a mundane city setting to settings that convey heritage significance to the participants. Although there is diversity in the long run terrain and distance, the common characteristic of all races is that they are situated outdoors and that they are not bound by a finite court (<http://aimsworldrunning.org/>). The popularity of long runs has increased in the last few years. This can be observed through the increasing number of runs being organized, as well as by the increasing participation of amateur and professional athletes (Assimakopoulos, 2015).

The focus of this paper will be on the amateur athletes (runners) and the setting of distance races (long runs) in places of heritage significance. Its purpose will be to identify whether there might be common areas of sports heritage and cultural tourism, as these blend with the amateur runner athlete's experience, which is further enhanced through augmented reality.

Sports heritage is a relatively unexplored topic (Ramshaw & Gammon, 2015). Moreover, although there has been a considerable amount of research on the topics of heritage, culture, and their interaction with tourism, the concept of tangible heritage as an influencer on the amateur runner athlete has not been discussed. It is interesting to examine how the setting of distances races motivates the runners to enlist, when the run is organized in a place of heritage significance. Moreover, augmented reality, one of the recent developments in information and communication technology, adds a new dimension on the race, because it communicates to the athlete information about the heritage trail and its surroundings, at the time of the race. Communication of such information may have a motivational effect on the athlete. An indicative literature review was conducted for themes that intersect the topics of amateur athletes of distance races (long runs), distance routes and sports trails, along with the elements of heritage, nostalgia, sport and tourism; additionally, the theme of the influence of augmented reality on the visitor (runner) was explored, and the way in which augmented reality may facilitate the amateur athlete to the formation of meaning for the heritage trail before and during the long run.

The structure of the paper is the following: Initially, the literature review findings are presented, organized in five categories: sports and heritage; the element of connectedness; memory, identity, legacy and sports; sports heritage and psychological distance; the role of augmented reality in a heritage trail run. Following, discussion of literature findings, further considerations for research, and limitations are presented.



The research questions were the following:

1. How is the heritage trail influencing the amateur long runner in
  - (a) Enlisting in a long distance event (pre-event decision-making)
  - (b) Experiencing the long distance event (during-event experience)
2. What is the role of augmented reality in 1(a) and in 1(b).

The paper purposefully disregards the motivation of professional athletes, because literature indicates that there may be significant differences in the motivation of the two groups (Beech & Chadwick, 2004; Getz, 2008; Karimian & Shekarchizadeh, 2010; Samadzadeh, Abbasi, & Shahbazzadegan, 2011), although it is also suggested that participation of professional athletes is a motivator for amateur runners' decision to participate (Mutter & Pawlowski, 2014).

## 2 Literature Review

As early as 1998, there has been a connection established between sport and tourism as being equal forms of travel (Gibson, 1998), hence athletes, i.e. people travelling to an area to participate in a sport event, are also considered tourists in that area (ibid). Viewing sport competition as an event that provides an experience in its own merit (Getz, 2008), deriving a meaning out of the experience, especially when immersing in it through active participation (Pine & Gilmore, 1998), and sieving this experience and its derived meaning as affected by the sport event's setting is also discussed (Funk & Bruun, 2007; Getz, 2008; Green & Chalip, 1998). The discussion here below is not at all exhaustive, as the topic can be approached from a wide variety of angles, as the literature indicates (Cohen & Cohen, 2012; Crouch, 1999; Gibson, 1998; Gibson, Kaplanidou, & Kang, 2012; Lamont, 2013; Lamont & Kennelly, 2012; Trauer, 2006; Weed, 2009).

### 2.1 *Sports and Heritage*

Ramshaw and Gammon, initially in 2005 and subsequently in 2015, create a link between sport and heritage. As early as 1998, Gibson defines the action of visiting sites connected to past sports events and the resulting relationship between sport and heritage as 'nostalgia' sport tourism. However, Ramshaw and Gammon explain that the term 'nostalgia' is too limited to include heritage, which should be addressed as a separate idea, so that the "complexity of the sporting past be revealed" (Ramshaw & Gammon, 2015, pp. 248–9).

Acknowledging that the aforementioned link is mostly intensified in the tourism context, and in line with their initial categorization of sport heritage of 2005, Ramshaw and Gammon (2015) further distinguish between five categories of

sport heritage, four of which rest with sport heritage attractions and one examines sport heritage as the heart of a touristic personal journey. The propositions that best connect to the research question of this article are the ones that correspond to the sport heritage discussion on “tangible immovable” and to “intangibles” (Ramshaw & Gammon, 2005, pp. 233–234).

In discussing heritage-based sporting events, Ramshaw and Gammon (2015) focus on sports events with significant leverage on heritage, such as the Olympic Games. On the other hand, the concept of authenticity within the culture of a destination is proposed. In turn, this concept is not new (Chhabra, Healy, & Sills, 2003; Crawford, 2004; Higham & Hinch, 2009, in Ramshaw & Gammon, 2015). However, the authors stress that “the notion that they [the sports events] specifically offer a more intimate and personalized interaction with a host’s heritage has received scant attention.” (p. 253). Despite the fact that heritage may be invented, bedecked, or even commodified to serve the purpose of tourist demand, the connection to one’s own heritage is per se motivational, and eventually authentic (McKercher & Du Cros, 2002, 2015; Ramshaw & Gammon, 2005; Timothy & Boyd, 2003). The motivation that the athlete derives from enlisting in a long run that is set in a heritage trail is also worth examining through the typology suggested in McKercher and Du Cros (2002, 2015). Asserting that the amateur runner finds himself on the setting of the heritage trail with the purpose of actively participating in the sport competition, he may be parallelized with the “purposeful cultural tourist” that “has a deep cultural experience” (McKercher & Du Cros, 2002, p. 144).

Especially in relation to the personal journey one may follow in sport heritage, often the objective of discovering heritage attraction is “to find something of the self” (Timothy, 1997, in Ramshaw & Gammon, 2015). It is with this sense that the amateur runner’s motive to enlist in the long run and his experience during the heritage trail run require further attention. As discussed in Ramshaw and Gammon (2005), nostalgia, being a sub-set of memory, is one of the components of sports heritage. However, the difference between nostalgia and heritage is the view of the past that each one brings to the present, with the former casting a “recollection [. . .] deeply melancholic”, whereas the latter acting as a “bedrock for the present and a platform for the future.” (Ramshaw & Gammon, 2005, p. 237). Without neglecting the power of nostalgia in crafting one’s personal journey, it is heritage that connects the past to the present and future.

Further discussed in Ramshaw and Gammon (2015) is the concept of making the journey to achieve “existential goals, such as the search for the authentic self or a sense of *communitas*” (italics in the text, Wang, 1999, in Ramshaw & Gammon, 2015, p. 254). Moreover, Ramshaw and Gammon notice that “sport heritage is often filtered through our interpersonal connections or our understanding of our place within our lived landscape.” (p. 255). Additionally, as noted in Bagnall (2003), Smith (2006) and Fairly (2003, 2009) in reference to nostalgia sport tourism research, “some journeys are more about maintain identity [. . .] than nostalgizing the toured location”, as “experiencing and performing heritage can, in and of itself, be a heritage” (In Ramshaw & Gammon, 2015, p. 255).

## ***2.2 The Element of Connectedness***

The elements of connectedness and meaning-making have also been discussed in the context of tourism, sport and charity events (Coghlan & Filo, 2013), in which case the participant is motivated to participate through a variety of ways, such as his relationship with the charity; in this case the participant is an amateur athlete, hence he feels the connectedness through the sport activity, or through other, fellow participants; the participant is attached to the destination or scenery; this last construct could contribute to the discussion on amateur athlete and heritage trail. The link between tourism sports and charity events has been discussed (Coghlan & Filo, 2013), without, however, an adequate connection to heritage, and its leverage to sports, either as a whole, or in its components, such as the influence of an aspect of heritage, like a heritage trail, to the motivation and the experience of the amateur athlete.

On the other hand, it becomes evident through the literature that the nexus of tourism, sport and charity events create meaning for the participants through their participation, the “connectedness” (Coghlan & Filo, 2013, p. 123), as well as through their sense of personal involvement (Schuyt, Bekkers, & Smit, 2010, in Coghlan & Filo, 2013) and contribution (Bekkers & Wiepking, 2007, in Coghlan & Filo, 2013) to an overarching, common, benevolent objective. It becomes clear, though, that the charity leverage outweighs any other component that could contribute to motivating amateur athletes to participate, and to giving meaning to the experience, including the heritage trail itself.

## ***2.3 Memory, Identity, Legacy and Sports***

More often than not, the term heritage relates to the celebration of the past, viewed from a cultural or historical perspective (McKercher & Du Cros, 2002, 2015; Timothy & Boyd, 2003), frequently being altered to serve the creation of an identity, hence becoming so fluid that remains “particularly illusive to define” (Ramshaw & Gammon, 2005, p. 230). Although heritage has no universally accepted definition, it comprises characteristics that range from tangible, movable and immovable proof of a connection to the past, such as buildings, monuments, artefacts, objects, etc., to intangible evidence, including memories, norms, customs and festivities (McKercher & Du Cros, 2002, 2015; Ramshaw & Gammon, 2005).

The importance of memory as a component of intangible heritage is of special interest, in view of the research question of this article. Memory, in the form of prior personal experience, as well as in the form of narrations of significant others, plays an integral role in the creation and the interpretation of the experience (Gibson et al., 2003; Trauer, 2006; Zeithaml, Bitner, & Gremler, 2013). At the same time, collective memory, as part of intangible heritage, is an elementary component of the formation of identity and legacy. Legacy, in turn, is an intrinsic component of

sport (Ramshaw & Gammon, 2005). Two different terms are defined, that of “heritage of sport” that “celebrates the achievements within the sport itself and creates a narrative strictly within the sport’s culture” and the “sport as heritage” which describes the case when “the accomplishment transcends the sport itself” (Ramshaw & Gammon, 2005, p. 232). Admittedly, sport originates from varied sectors such as “history, nostalgia, memory, myth and tradition” (Ramshaw & Gammon, 2005, p. 232), serving as a link to the present, an element of identity, and, potentially, a factor of economic development in an area. Cultural heritage is found to be a collective term that includes nostalgia sport tourism (ibid). Yet, nostalgia sport tourism is not identical with sport heritage, as depicted in Ramshaw & Gammon (2005).

## ***2.4 Sports Heritage and Psychological Distance***

The influence of heritage is also connected to heritage tourism research, and more specifically to the notion of psychological distance in the heritage experience (Massara & Severino, 2013). There are two major areas of research on the topic, namely heritage management and heritage tourism; it is this approach that examines the motivations and experience of tourist visiting a heritage site (Goulding, 2001; McCain & Ray, 2003; McIntosh & Prentice, 1999, in Massara & Severino, 2013). As heritage management focuses on aspects of sustainability, funding (Garrod & Fyall, 2000; McDonald, 2010), overcrowding and spatial pressure (Li, Wu & Cai, 2008) and community involvement (Giovanardi, 2011, in Massara & Severino, 2013), psychological distance will be reviewed from the point of view of the heritage tourists, as this is a more customer-centric view (Poria, Reichel, & Biran, 2006, in Massara & Severino, 2013).

The most important construct of this approach is the phenomenological view that “the core of a heritage experience lies in the intimate relationship that the person experiences with the heritage.” (Massara & Severino, 2013, p. 109). It is interesting to say that Hinch and Highmam (2005, in Ramshaw & Gammon, 2015) suggest that heritage be felt through the actual athletic performance, in the sense that the sport tourism journey may have a catalytic role in discovering and demonstrating one’s one identity. The ignition for this self-discovery journey, which may be both on a cognitive and on a sensory level, may often be the athletic performance on a heritage trail.

Moreover, using as a starting point the statement of Poria et al. (2006) that the link between the person and the place he visits allows for better understanding of his behavior during the visit; Voase’s (2007) discussion on the interaction between the tourist background and the site (in Massara & Severino, 2013), and addressing the propositions of Massara & Severino (2013) in regard to experiential, spatial and psychological distance of the visitor to the heritage, it becomes evident that the “experiential distance [. . .] can influence the psychological distance to a greater extent.” (p. 120).

Saunders, Lewis, and Thornhill (2009) discuss the theory of social constructivism, under which social actors become interpreters of the situation in which they participate, and the interpretation is likely to influence their interactions as well. In viewing the interaction of the amateur athlete with the heritage trail through this lens, the amateur athlete interacts with the surrounding environment as he perceives it through the heritage trail in which the long run takes place, but also aims at interpreting this environment through other amateur athletes he competes with. In the event that he uses an augmented reality device for the run, he also interprets the experience of running in a heritage trail through the data provided to him through the augmented reality device.

## ***2.5 The Role of Augmented Reality in a Heritage Trail Long Run***

The emergence of social behavior as it is shaped by “computational information systems, such as blogs, wikis and social bookmarking” (Sigala & Christou, 2014, p. 771) is discussed in the literature, in view of the recent advances and applications of IT that pertain to what is collectively known as social computing. As such, “social computing applications significantly influence travelers’ behavior, perceptions and experiences at tourism destinations” (Sigala & Christou, 2014, p. 771). Although the topic of social computing in relation to tourism behavior is increasingly under research, it has not been dealt with from the point of view of the amateur runner.

As early as 1997, Azuma (1997) defines augmented reality as a type of virtual reality, which allows the user to simultaneously see the real world and receive information from virtual objects that are “superimposed upon or composited with the real world.” (p. 356). By adding virtual content to a real setting, augmented reality has the ability to influence the formation of the final experience for the user (ibid). Neuhofer, Buhalis, and Ladkin (2013) suggest that the tourist experience is substantially complemented and intensified through the use of various types of technology, one of which is augmented reality.

Literature suggests that the belief that tourism experiences are bounded by the silent observation of sites and landscapes seems outdated (Neuhofer et al., 2013). Augmented reality allows for stronger interaction and therefore more involvement between the visitor and the place (Tartzgern et al., 2014; 2015). The point is even more valid for amateur athletes. Long distance running, being a lonely sport, has to do with testing one’s own limits. Especially for runners, the prevailing attitude is to focus on the experience, on the race. For them, the setting has been deliberately chosen for a very good reason: It enhances the race. This makes the art of impacting their experience even more purposeful. But it is not just the run; it is how the run is experienced that makes the difference.

Massara & Severino (2013) refer to the propositions of experiential, spatial and psychological distance as a construal of reality. “Augmented reality enables users to retrieve information about real world objects and locations” (Tatzegrn et al., 2013, p. 49). It can help giving information to the amateur athlete related to the heritage trail, thus shaping the construal of reality and hence impacting on the psychological distance. Ramshaw and Gammon (2015) discuss the mortality of an intangible event. In contrast, augmented reality may allow for perpetuation of life of the experience long after the actual experience has been completed. Chronis (2005a) (in Massara & Severino, 2013) states that the result of the visit, the athlete’s run in this case, is a factor of the cultural narrative formed by the information provided, as well as of the visitor’s (the amateur athlete’s) effort to follow the narrative with his imagination. In the case of running events in a heritage trail it is augmented reality that provides the narrative, and the effort to fill it in is also completed through the amateur athlete’s intimate relationship with the heritage.

Mobile technology advancements, another aspect of augmented reality, have substantially contributed to identifying users’ preferences through social media and similar tools (Buhalis & Foerste, 2014). This interactivity, in turn, allows for further opportunities for networking, social collaboration, community building and learning intelligence. This is valid for amateur athletes, who operate in the sense of sharing their feeling, varying from deep personal feelings to other, more obvious, heritage-related ones. Examples of internal contextual information or human factors would be goals, personal events, tasks, social environment and emotional state (Prekop & Burnett, 2003).

### 3 Discussion

Departing from Ramshaw and Gammon’s (2005) questioning of the classification of the sporting past as nostalgia or heritage, as well as on the inquiry in regard to demand drivers of heritage sport tourism, the present article tries to explore the connection that the amateur athlete develops with the heritage trail, on the occasion of the sporting competition. What is the meaning that the amateur athlete derives from running in a heritage trail? How important can the heritage trail become for motivating the amateur athlete to enlist and to experience the long run? Even more, how can the athlete interpret the importance of the heritage trail with the help of the information provided through the augmented reality devices, i.e. on the spot, real-time information pertaining to the specific heritage trail? Robinson and Gammon (2004), in Ramshaw and Gammon (2005), assert that there are countless reasons that motivate a tourist to visit sport heritage or a sport destination, with nostalgia being a stronger motivator than the destination itself. However, given that nostalgia is part of memory, and that memory is an integral component of heritage, there could be evidence to believe that it is heritage that acts as a motivator for participating in a sport competition connected to a heritage trail.

On the other hand, technology-enhanced tourism experience is generally split into three phases for every journey: pre-travel, during travel and post-travel (Neuhofer et al., 2013). The first deals with inspiration and preliminary search, in which case tools such as virtual reality systems and interactive web sites are used. It is at this phase that the amateur athlete may be motivated to enlist to a long run set on a heritage trail. The second is about interaction while on site, whereby navigation, information retrieval, and real-time content generation are utilized. The third one is mostly about experience sharing. As noted earlier, augmented reality plays a key role in shaping the experience while on site.

As stated above, technology influences everyday life, and, by extension, sport and tourism, in the pre-, during, and post-stages of the experience. Social media play a crucial role on all three stages. This means that “with technology, the tourism experience is no longer restricted to services encounters on-site but is extended and dynamically created in both physical and virtual experience spaces” (Neuhofer et al., 2013, p. 2). In other words, with the emergence of technologies tourism experiences are co-created and increasingly enhanced. On the other hand, running means celebrating forms of healthy living. Health is not experienced only in the body, but also in the mind. When, during the race, there comes a moment that the athlete feels physically defeated, there comes the need for emotional refreshment, an encouragement. Therefore, augmented reality, as expressed above, comes to life.

Personalization is a key word in the world of delivering experiences to users. It starts from the assertion that each user is unique. However, in the case of long runs, social groups are also important. Amateur athletes run for themselves, but they share the space, the heritage trail in this case, with others. They have a common view of their race challenge. This homogeneous group is keen in expressing their sense of connectedness, because of their common passion and goal to finish the run; in turn, this makes the art of impacting their experience even more purposeful. Additionally, the length of the race course on the heritage trail and the diversity in natural surroundings or in landmarks enhances the variety of shared content further.

A different dimension can be added to this discussion when examined from the point of view of technology. Software in social networking has been evolving at a fast pace and will continue to do so. However, social content had been isolated, at least initially, from the world of mobile communications. Applications had grown somewhat independently. It is a matter of time till they reach a mature merge. The degree of intelligence will be enhanced, making the two sectors possible to collaborate. Information from both social and location-based services is being combined. Semantic web will bring about possibilities to recognize and understand the meaning of content and therefore maximize the potentials of combining them in one source of knowledge.

## 4 Implementations and Considerations for Further Research

This conceptual discussion attempts to examine the role of heritage trails and the influence of augmented reality on the experience of the amateur runners of long distance races, before and during the race. For operational reasons, the discussion is kept from the point of view of the athlete, i.e. the demand side. However, many points could be further researched, both from the demand and from the supply side.

As far as the demand side is concerned, what may be of interest is to test the research questions raised in this conceptual discussion by the means of quantitative research methods, one aspect of which could be to examine whether demographic characteristics, such as the age of the amateur long run athletes play a significant role in the formation of the experience, the latter being filtered through augmented reality. Additionally, the role of spectators in the context of the heritage trail needs to be further explored, in the sense that, just like the athletes themselves, spectators interact with amateur athletes and enhance the experience, thus have a potential capacity to alter its quality. On the other hand, it is worth considering that, before the runners seize the day in the heritage trail and disseminate their unique experiences to others, their input as a vital part of the experience is important to respond to the provision of personalized services. This would provide more information to the supply side, namely to heritage managers, as well as to long run organizers, in relation to their role in the experience of the amateur long run athlete.

Another point of interest might be to explore whether such heritage trail long runs could be a factor of economic development in an area; also the environmental and sociocultural impacts of such sporting events are worth exploring, in conjunction to the pressure they may put on a heritage trail. Given the ever increasing popularity of long runs in places of significance, it would be interesting to further explore whether it is a specific type of heritage (ex. associated with a specific historical aspect) or a wider concept of heritage, such as a wine route, gastronomy fair, or a cultural or spiritual site that may equally motivate athletes.

Even more so, as technology constantly evolves, it might be interesting to explore the potential of augmented reality for athletes, given the personalization it provides to the experience. What is worth exploring is how the experience keeps living on in the cyber-world, long after the actual run is over, and how the amateur athletes that are, at the same time, users of social media, further expand their experience, share it through their profile, and possibly become motivated, or motivate other users, to participate in subsequent long runs. With time, the related technology will include a higher degree of intelligence. Currently, the content from mobile context and social context are still not strongly connected. The semantic web will bring about possibilities to recognize and understand the meaning of content and therefore maximize the potentials of combining them in one source of knowledge.



## 5 Limitations

The main limitation of this research was the fragmentation of the topics when discussed in the literature. That is to say, it was found that all topics have been widely discussed, thus contributing significantly to body of knowledge, but each one from a different angle. The vastness of the different shades and tones under which each of the above mentioned topics was met during the literature review puts a limitation to the exhaustiveness of this review. An effort was made to conceptualize the three seemingly unrelated areas, that of the amateur athlete, of the heritage trail and of the augmented reality.

## 6 Conclusions

This conceptual discussion attempted to examine the role of heritage trails and the influence of augmented reality on the experience of the amateur runners of long distance races, before and during the race. More specifically, the motivation of the amateur athletes to enlist in a long run that is set on a heritage trail, as well as their experience during the run was discussed. Additionally, the impact of augmented reality in the formation of this experience was examined.

Initially, the concepts of sport and heritage were examined. It was found that although sport and heritage share common grounds, they have been scantily discussed in the literature as one concept. Sport heritage is connected to the concepts of nostalgia, authenticity, and a sense of personal journey in order to discover, and eventually demonstrate one's own identity. At times, this seems to be done through the connectedness with heritage. The latter is further discussed, as it plays an important role in giving meaning to the visitor's experience. Memory, identity, legacy and sports are subsequently discussed, as memory plays an equal part in heritage, nostalgia and in shaping connectedness. The concept of the personal journey is re-examined, as it relates to the formation of identity, and in making meaning out of the heritage visit. Subsequent to this point is the discussion of sport heritage and its relation to psychological distance, which is an equally important element in making meaning out of heritage. Finally, the role of augmented reality is discussed, as a factor of providing information to the visitor, the amateur athlete in the case, during the experience of a long run, when this is set on heritage trail.

A discussion of the above topics showed that augmented reality, when used as a mode to convey to the amateur athlete information about the heritage trail while being on the spot, could be considered as an influencer to the experience felt during the heritage trail long runs. To a lesser extend the same holds for the motivation of the amateur athlete to enlist in such a run. The discussion showed that augmented reality has the ability to influence the amateur athlete's experience, so much so, that when that point is reached where finishing the run seems an insurmountable task,

the information provided through augmented reality may operate as emotional refreshment, an encouragement to complete the race. The main limitation of this research was the fragmentation of the topics when discussed in the literature.

Implementations and considerations for further research on the demand side include, but are not exhaustive to, testing the questions raised in this conceptual discussion by the means of quantitative research methods, and investigating the role of spectators in shaping the amateur athletes' experience on a heritage trail long run. On the supply side, several topics require further investigation, such as the impacts of long runs to heritage trails. Finally, the catalytic role of technology, in this case of augmented reality and its future descendants, is to be further researched as to its influence in the running experience.

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# Do TAM Constructs Predict E-tourism Adoption by Hotels in Agadir City South of Morocco?

Rachid Oumlil and Yazid Ouhamane

**Abstract** Most developing countries considered tourism sector the main vector of their development. It is the source of their investment and job creation. To promote this sector, Morocco, fixed up a tourism strategy 2020. The latter targeted to rise up supply of the Moroccan regions and serve as a growth mechanism for these regions. However, to achieve this goal, the Moroccan government expected emergence of Information Technology (IT) and its contribution to the tourism industry.

In the last decade, IT becomes ubiquitous in tourism organisations. For instance, hotels invest a large amount of their budget in the IT to promote their touristic offers and facilitate their financial statements. Moreover, IT allows tourism professionals and customers an efficient access to valuable and constructive information.

This main objective of this communication is to test ability of Technology Acceptance Model (TAM) (Davis, Bagozzi, & Warshaw, 1989) to predict IT adoption by hotels in Morocco. The study was conducted at hotels located in Agadir city, South of Morocco. It expects to provide a useful knowledge on technology acceptance that could help policymakers to succeed in tourism IT strategies.

**Keywords** IT adoption • Hotels • Tourism • Technology Acceptance Model • Morocco

**JEL Classification** M15 • IT Management

## 1 Introduction

Most developing countries consider tourism sector the main vector of their development. It is the source of their investment and job creation. With about 500,000 direct uses which correspond to meadows of 5 % of employment in the whole of the Moroccan economy. It contributes decisively to the major macroeconomic balances, and impacts positively the other development sectors. To promote the

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tourism sector, Moroccan government proposed the 2020 strategy. This strategy points out tourism diversity, increases the supply of the Moroccan regions and serves as a growth mechanism for these regions. It aims to increase the size of the tourist sector, in order to move up Morocco to one of the top world tourist destinations. However, to successfully achieve this goal, the Moroccan tourism sector expects the emergence of IT as a new vector that could bring major changes.

Nowadays, Information technology (IT) becomes ubiquitous in tourism organisations. It is involved in different stages of the tourism value chain: Travel agencies, tourist transport operators, hotels, actors positioned at related activities (cultural, recreational and restaurant) and finally tourist accommodation. IT contributes to create new services and opportunities for the tourism industry by integrating new forms of work. It also changes the way in which service companies communicate with their customers and partners.

Unquestionably, hotels continue to invest heavily in information technology. IT plays an important role in promoting their touristic offers and facilitating their financial statements. Moreover, it gives tourism professionals and customers an access to the desired information instantly. Hence, IT is considered as an important innovation key that could help offering better quality services.

This main objective of this communication is to test ability of Technology Acceptance Model (Davis et al., 1989) to predict IT adoption by hotels within Morocco. The study was conducted at hotels located in Agadir city, south of Morocco. This city is one of the most popular destinations in Morocco. It is considered the second tourist resort of the country with resort a bed capacity of 29,026 beds and 96 hotels.

The rest of the paper is structured as follows. First, authors introduce Technology Acceptance Model and its applications in tourism context since 2008. Second, they present hypotheses and the research model. After they explain their methodology, present results and discussion. At the final section authors conclude and outline some managerial implication of this research work.

## 2 Theory

TAM is considered one of the most widely applied models to understand adoption and usage of IT. It had been tested in many different contexts (Holden & Karsh, 2010). It shows a successful power in predicting and explaining individual behavioural towards IT usage. Thereby, this communication tested TAM ability to predict IT adoption by hotels in Morocco. The following subparagraphs present the TAM and highlight its applications in tourism context.

## ***2.1 Technology Acceptance Model***

Literature in Information Technology area showed that a large number of models were drawn from the Theory of Reasoned Action (TRA) (Fishbein & Ajzen, 1975). One of these models, moreover, the simplest used by the researchers in this area is the Technology Acceptance Model (TAM). Since it was developed, it is proved to be the most powerful model to point out variables predicting and explaining IT adoption (Adams, Nelson, & Todd, 1992; Chang, 1998).

TAM postulates that IT actual use can be determined by behavioural intention. This later is influenced by individual attitude. Behavioural intention is modelled as a function of the attitude and usefulness and determines the actual use. Attitude is defined as the positive or negative feelings towards IT. Within this model, Davis et al. (1989) defined the two constructs that are of primary relevance to computer adoption behaviours: (1) Perceived Usefulness (PU) means degree to which a person believes that using a particular system would enhance his/her job performance; (2) Perceived Ease of Use (PEOU) designs degree to which a person believes that using a particular system would be free of effort. These two basic constructs undergo the effect of external factors influencing positively or negatively behavioural intention toward IT.

## ***2.2 TAM in Tourism Context***

In 2008, Buhalis and Law noted that IT has dramatically changed tourism industry since 1980. This technology brought unprecedented opportunities for hotel organisations (Gretzel and Fesenmaier, 2009), and engendered transformation in their behaviour. To understand IT usage in tourism industry, many studies have been developed testing TAM.

Kim, Kim, and Shin (2009) observed that Korean Airline sector has increasingly employed electronic commerce (E-commerce) technology for strategic purposes. However, acceptance of this technology is considered key success factor for each strategy. Hence, authors employed TAM to predict the acceptance of airline business-to customer (B2C) E-commerce websites (AB2CEWS). Empirically, they used data collected from customers using B2C E-commerce websites of two representative airline companies in South Korea. Their results showed that subjective norms, E-trust, perceived ease of use, perceived usefulness, and attitude were the main predictors of the AB2CEWS acceptance.

In 2010, Casaló et al. attempted to explain consumers' intentions to participate in firm-hosted online travel communities. They based on Theory of Planned Behaviour, the Technology Acceptance Model, and Social Identity Theory to develop their research model. To test the later, they distributed 456 questionnaires via web to members of several firm-hosted online travel communities. They concluded that

consumers' intention to participate in such is determined by Attitude, Perceived Behavioural control and PU.

Morosan (2010) extended and applied TAM to the context of biometric systems in the hotel industry. He aimed to examine factors that influence guests' attitudes and intentions to use biometric systems in hotels. The author tested of his research model on 621 students enrolled in the MBA. Results showed TAM is an appropriate theoretical framework for the examination of adoption of biometrics in hotels, and Attitude was the significant factor of this intention.

As for Phatthana and Mat (2010), they investigated factors that could predict e-purchase intention of health tourism in Thailand. To develop their research model, they referred to TAM and extended it by Image construct. This model was tested on 236 patients aged from 15 years and above who are undergoing health treatment services at eight private hospitals. Results revealed the significant influence of PU, PEOU and Image on E-purchase intention of Thailand health tourism.

In 2011, Chen and Chen explored factors affecting travellers' intention to use the vehicle GPS products. To do, they based on TAM that had frequently mobilised in IT adoption studies. Authors concluded that this intention is determined by two constructs only: Attitude and personal innovativeness.

In the perspective to find out new way to help Egyptian tourism organisation, El-Gohary (2012) analysed factors affecting E-Marketing adoption by these organisations. He referred to TAM and Innovation Diffusion Theory (IDT) to develop his conceptual framework. Empirically, El-Gohary adopted a quantitative approach; in witch data is collected by survey strategy through questionnaires distributed to 368 small tourism organisations. Results showed that PEOU and compatibility were found to be the significant factors affecting E-Marketing adoption by Egyptian small tourism organisations.

Tseng, Tu, Lee, and Wang (2012) underlined the importance of destination management system (DMS) and explored the opportunity to adopt it in Taiwan. For this objective, they mobilised the modified Technology Acceptance Model (TAM), to examine factors affecting tourists' intentions to use this system. Authors elaborated and administrated their questionnaires to 400 tourists. Results supported the modified TAM in explaining consumers' behavioural intentions to use/adopt DMSs and noted the significance of Attitude, Perceived Enjoyment in predicting this intention.

Herrero and San Martín (2012) attempted to develop a model predicting the intention to use the websites of the rural tourism accommodations to search for information and to make online reservations. They referred to TAM to develop their hypothetical model. The later was tested on the population of 1083 rural Spanish websites users. Authors found that PU is the main direct antecedent of both types of intention: (1) search information and (2) make online reservations. Moreover, PEOU has a stronger direct influence on the intention to use the websites to search for information than on the intention to use them to make online reservations.

In 2013 Huang et al. observed a gap in formal theory to understand the significance of virtual worlds to tourism destination marketing. Hence, they tried to develop a model identifying the factors that affect tourists' experience and



behavioural intentions within a 3D tourism destination. For this, they extended Technology Acceptance Model by incorporating hedonic elements of enjoyment, emotional involvement, positive emotions, and flow experience. Empirically the developed model was tested on 198 students. Results underlined the importance of PU and PEOU in predicting tourists' intention towards 3D tourism destination.

Moreover, Ayeh, Au, and Law (2013) investigated factors affecting online travel consumers' intentions to use consumer-generated media (CGM) for the specific purpose of travel planning. They based on TAM and three added constructs (Perceived trustworthiness, Perceived similarity and Perceived enjoyment) to identify the significant factors predicting these intentions. Using an online survey of 834 travel consumers, findings shed light the importance of PU, PEOU, Attitude and Perceived Enjoyment in determining online travel consumers' intentions to use CGM.

Furthermore, Oh, Jeong, and Baloglu (2013) attempted to explain why travellers choose self-service technologies over service staff, and to examine the customer's willingness to adopt these technologies. They mobilised TAM and enriched it by introducing an intrinsic factor, the desire for human interaction and related constructs (the traveller's desires for privacy, autonomy, and effectiveness) to develop the research model. To test the later, data were collected from 1690 American resort hotel customers. Results revealed the significance of the main TAM construct (PU) in predicting adoption of self-service technologies.

From the literature revue above, only two studies were conducted in developing countries (El-Gohary, 2012; Phatthana & Mat, 2010). Their results pointed out the importance of PU, PEOU and Image to predict IT adoption in these countries. Moreover, Majority of studies stated at Table 1 conducted in USA (Ayeh et al., 2013; Huang, Backman, Backman, & Moore, 2013; Morosan, 2010; Oh et al., 2013) and Asian countries (Chen and Chen, 2010; Kim et al., 2009; Tseng et al., 2012). Most of these studies were conducted on students (Huang et al., 2013). This is due to the facility to collect data. As concerning E-tourism applications, authors

**Table 1** Demographic profile of the sample (N = 30)

Variable	Content	N	(%)
Gender	Men	19	63.3
	Women	11	36.7
Category of hotels	1*	5	16.67
	2*	11	36.67
	3*	4	13.33
	4*	7	23.33
	5*	3	10
Type of Information Technology (IT) used	Professionals	30	100
	Social Networks	28	93.33
Baccalaureate	Scientific	12	40
	Business and Economics	4	13.33
	Litterer	14	46.66

noted variation in these applications (Websites, Destination Management Systems, GPS devices. . .). Furthermore, Attitude was found to be the most significant factor predicting this IT usage in tourism context, followed by PU and PEOU.

In this study, authors tested the applicability of the TAM model in the tourism setting, specifically within hotels. The growing importance of ITs for hotels organisations, leads authors to test the power of TAM to predict their adoption within these organisations.

### 3 Research Model and Hypotheses

The research model is inspired from TAM (Davis et al., 1989). It includes three principal TAM constructs: Perceived Usefulness, Perceived Ease of Use and Attitude. Compared to the traditional TAM model, the interrelationships between PU, PEOU constructs and the Attitude variable have been modified to stress the importance of the later in prediction the intention hotels to adopt IT.

Theories of reasoned action (TRA) (Fishbein & Ajzen, 1975) and Planned Behaviour (TPB) (Ajzen, 1991) examined individual behaviour, and concluded that IT adoption, as behaviour, can be depicted by Intention variable. This later is defined like an intermediate between attitude and the behaviour (Fishbein & Ajzen, 1975). It shows desire, wish, and determination or will to emit a behaviour. Dodds, Monroe, and Grewal (1991) specified that intention to IT adoption represented the probability that a potential user will intend to use technology. Referring to Technology Acceptance Model, Intention is influenced by individual Attitude, Perceived Usefulness (PU) and Perceived Ease Of Use.

According to Ajzen (1991), attitude is a predisposition to answer an object in a favourable or unfavourable way. It is defined as the feeling of pleasure, gaiety and dissatisfaction that associates individual to a given behaviour (Triandis, 1980). It expresses the positive or negative feelings about performing the IT acceptance (Davis et al., 1989). In tourism context, several studies noted the positive influence of attitude on intention to adopt IT (Ayeh et al., 2013; Chen & Chen, 2011; Tseng et al., 2012). Hence the following hypothesis is supposed:

*H1: Attitude influences positively the intention of hotels to adopt IT in Morocco.*

Perceived usefulness (PU) is one of the prior belief constructs developed by TAM. It is defined as the degree to which a person believes that using a particular system would enhance his or her job performance. In the Information System arena, it means, whether IT usage could enhance productivity and efficiency of a user, it will affect his intention to adopt it. PU is proved to be an important determinant of IT adoption (Venkatesh & Davis, 2000). Therefore, Perceived usefulness is supposed to influence positively directly and indirectly (via attitude) the intention Moroccan Hotels to accept IT usage. Hence, these relationships are hypothesized as follows:

*H2: Perceived Usefulness influences positively the intention of hotels to adopt IT in Morocco*

*H3: Perceived Usefulness influences positively indirectly (via Attitude) the intention of hotels to adopt IT in Morocco*

Perceived Ease Of Use (PEOU) refers to the degree to which a person believes that using a particular system would be free of effort (Davis et al., 1989). It indicates degree to which a user finds that the use of a technology is relatively deprived of effort. Technologies perceived as being easier to use and less complicated are more likely to be accepted by potential users. Compared to PU, PEOU is considered the second important determinant of a user's IT acceptance. In Information Technology arena, user intention is affected by his feelings about whether this technology is easier to use. Referring to Davis et al. (1989), Perceived easy of use is supposed to influence positively directly and indirectly throughout attitude, the intention of Moroccan Hotel to adopt IT. Therefore, this relationship are hypothesized as follows:

*H3: Perceived Ease Of Use influences positively the intention of hotels to adopt IT in Morocco.*

*H4: Perceived Ease Of Use influences positively indirectly (via Attitude) the intention of hotels to adopt IT in Morocco*

*H5: Perceived Ease Of Use is positively related to Perceived Usefulness*

## **4 Methodology**

To test the research model, authors concentrated on hotels located at Agadir city, south of Morocco. They drew up a list of population starting from a request with the regional delegation of the Ministry of Tourism. In total, they have a population made up of 90 hotels, but they were limited on 30 hotels only. This is due to: (1) exploratory nature of the study (2) security system that limited access to hotels (3) difficulty to reach persons in charge, July coincides with the peak summer season.

To collect data, Authors adopted Face to face method: administration in direct contact with the surveyed by the door-to-door. Despite its drawbacks in terms of time and cost it allows to test the form of questions, scheduling and check their understanding of the respondents as well as the relevance of the modalities of the proposed terms of the answers.

Data collection process took place 13 days, from the 1st to 30th July 2014. The response time of the surveyed varies from: the same day to a maximum period of 1 week. In the major part of the time a second appointment was necessary to get the survey. Totality of the 30 questionnaires distributed was collected. Majority of the respondents belonged to hotel category of two stars (2\*) (36.67 %), followed by 4\* category (23.33). Most of respondents were men (63.33 %) and got litterer

baccalaureate (46.66 %). Moreover, all of these respondents used professional IT, and good part of them used social networks technologies (93.33 %) (Table 1).

Scales used for this study were adapted from the works of Davis et al. (1989). The measurement items were anchored on a 7-point Likert scale from “strongly disagree” (1) to “strongly agree” (7) in which respondents indicated an appropriate response.

### 5 Data Analysis and Results

The research model represented in Fig. 1 was evaluated using Partial Least Squares (PLS) approach. It is classified as a powerful method to study structural models involving multiple constructs with multiple items (Rigdon, 1998).

PLS approach consists of two steps to validate predictive models using reflective latent constructs (Henseler, Ringle, & Sinkovics, 2009). The first step allows the assessment of the measurement model representing the relationships between items and the constructs that they measure. The second step includes the assessment of the structural model depicting the relationships between the constructs as specified by the research model.

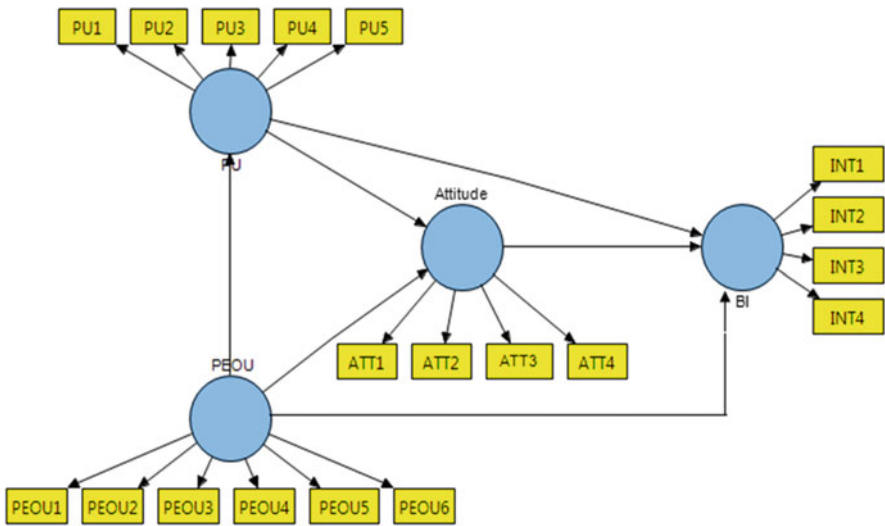


Fig. 1 Research model

**Table 2** Items loading, construct composite reliability (CR), internal consistency reliability (ICR)

Construct	Items	Item loading	Construct CR	ICR (Cronbach's alpha)
Perceived Easy Of Use (PEOU)	PEOU1	0.869489	0.919381	0.897737
	PEOU2	0.818308		
	PEOU3	0.752835		
	PEOU4	0.921596		
	PEOU5	0.732636		
	PEOU6	0.841043		
Perceived Usefulness (PU)	PU1	0.846815	0.936841	0.91546
	PU2	0.766957		
	PU3	0.954367		
	PU4	0.87577		
	PU5	0.872315		
Attitude (ATT)	ATT1	0.746457	0.820178	0.702632
	ATT2	0.827359		
	ATT3	0.556264		
	ATT4	0.774254		
Intention (INT)	INT1	0.880186	0.947106	0.929321
	INT2	0.891803		
	INT3	0.928332		
	INT4	0.915434		

### 5.1 Measurement Model Assessment

Measurement model called also the outer model. It describes the relationships between constructs and their corresponding manifest indicators. Assessment of the measurement model is performed by: Internal Consistency Reliability (ICR), Convergent validity and discriminant validity (Henseler et al., 2009).

To assess the ICR, authors used the Cronbach's Alpha coefficient ( $\alpha$ ). It is verified when the alpha is above the minimum acceptable threshold of 0.7. In Table 2, all constructs indicated composite reliability (CR) above 0.7. Moreover, internal consistency (ICR) of the scales is verified for all constructs because their Cronbach's Alpha doesn't exceed threshold value and confirmed a satisfactory reliability.

Convergent validity explains the extent to which the indicators of a construct are greater correlated to each other than the other indicators of other constructs. Referring to Fornell and Larcker (1981), convergent validity assessment implies to calculate item reliability for each measure, composite reliability for each construct and the average variance extracted (AVE).

Item reliability involves the factor loading for that measure should be 0.70 or greater, which indicates a well-defined structure. As shown in Table 3, all of the factor loadings were greater than 0.70, and most were well above that level. Moreover, composite reliability, 0.70 value or higher was recommended by Bacon, Sauer, and Young (1995).

**Table 3** Diagonal elements are the square root of the shared variance between the constructs and their measures (AVE); Off-diagonal elements are correlations between constructs (N = 30)

	Attitude	BI	PEOU	PU
Attitude	<b>0.7332</b>			
BI	0.279442	<b>0.90413</b>		
PEOU	0.607302	0.216028	<b>0.8113</b>	
PU	0.409354	0.355667	0.669985	<b>0.8653</b>

As for AVE, it measures the percentage of variance captured by a construct by showing the ratio of the sum of the variance captured by the construct and measurement variance. It is acceptable if it is greater than 0.5.

As concerning discriminate validity, it is assessed following Fornell and Larcker (1981) guidelines. We first use the average variance extracted (AVE), then capture the average variance shared between a construct and its measures. This measure should be greater than the variance shared between the construct and other constructs in the model (Barclay, Higgins, & Thompson, 1995). Moreover, the diagonal elements in the matrix should be significantly greater than the off-diagonal elements in the corresponding rows and columns (Gefen & Straub, 2005). Note, that AVE is generated automatically using the bootstrap technique by the PLS-Graph. Table 3 lists the correlation matrix for the construct. The diagonal elements in the “correlation construct” (in bold) are the square roots of the AVE. Off-diagonal elements are the correlation among construct. Results revealed that AVE for each construct is larger than the correlation of that construct with all other construct in the model (i.e. the diagonal elements are greater than the corresponding off-diagonal elements).

Moreover, discriminate validity is assessed by extracting the factor and cross loadings of all indicators to their respective constructs. Each indicator should be significantly related to the construct, and should not have a stronger connection with another construct (Chin, 2010). Results indicated that all indicators loaded on their respective construct are more highly than on any other, confirming that the constructs are distinct. Hence the discriminate validity was confirmed.

## 5.2 Structural Model Assessment

The structural model called also the inner model. It indicates the causal relationships among constructs in the conceptual model (Hair, Sarstedt, Ringle, & Mena, 2012). It includes estimates of the path coefficients, which indicate the significance of the hypothesized relationship (relationship between the dependent and independent variables). It also provides R2 value, which determine power of the model (the variance explained by the independent variables). The R2 value and the path coefficients indicate how well the data support and hypothesized model. We run PLS-Graph using a nonparametric test of significance known as bootstrapping method to determine the significance levels for loadings weights and path

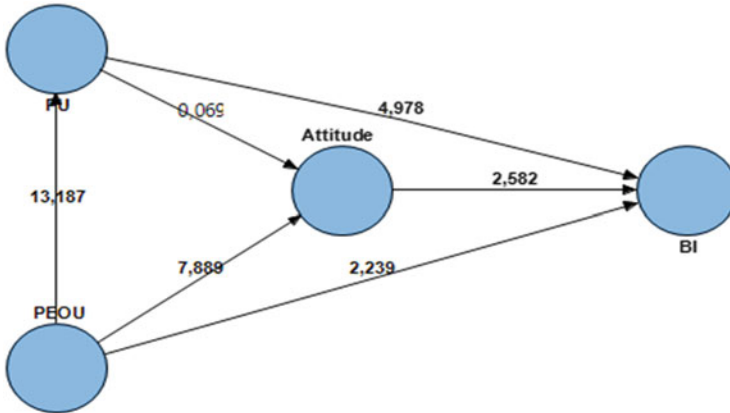


Fig. 2 Structural model

coefficients (Gil-Garcia, 2008). Figure 2 shows that the research model could explain 16 % of total variable (R2) in the intention of the hotels to accept IT usage. As expected, Perceived Usefulness showed a significant impact on the Hotel Behavioural intention ( $\beta = 4.978$ ). Moreover, Perceived Easy of Use ( $\beta = 2.239$ ) and Attitude ( $\beta = 2.582$ ) showed significant positive influences on this intention. In addition to these results, PEOU exposed a significant positive influence on PU ( $\beta = 13.187$ ) and Attitude ( $\beta = 7.889$ ). However, PU showed ne impact on Attitude.

## 6 Discussion

The main objective of this communication is to test the power of TAM in predicting IT adoption in Morcco. For this issue, the model was tested in Moroccan hotels, especially those located in Agadir city. As indicated in results above, Perceived Usefulness influences positively the intention of Moroccan hotels to adopt IT. This result confirms the pragmatic behaviour of the interviewed hotels, and tends to focus on the usefulness of the information technology itself. Moreover, positive impact of PU on the Moroccan hotels intention to adopt IT confirms believes in using a particular system would enhance their job performance. Hence, Moroccan hotels adopt this technology when it demonstrates its ability to fill their needs. This finding is similar to those for (Ayeh et al., 2013; Casaló, Flavián, & Guinalú, 2010; Herrero & San Martín, 2012; Huang et al., 2013; Kim et al., 2009; Oh et al., 2013; Phatthana & Mat, 2010).

In agreement with Kim et al. (2009), Phatthana and Mat (2010), El-Gohary (2012), Herrero and San Martín (2012), Huang et al. (2013) and Ayeh et al. (2013), the Perceived Easy Of Use influences positively the intention of Moroccan hotels to IT adoption. This may suggest that they are ready to use IT whenever it would be free of effort. Otherwise, hotels will use technologies if they are relatively deprived of effort and less complicated.

Prior studies stressed the positive direct relation between Attitude and Behavioural intention to adopt IT in tourism context (Ayeh et al., 2013; Casalo et al., 2010; Chen & Chen, 2011; Kim et al., 2009; Morosan, 2010; Tseng et al., 2012). Similarly to these studies, results showed that attitude has a significant impact in the Moroccan context. This emphasizes the importance of hotels' attitude and their beliefs on the benefits of using IT.

## 7 Conclusion

This communication aimed to test the power of TAM to predict IT adoption by hotels located in Morocco. It was conducted in Agadir city, South of Morocco. Results showed that Perceived Usefulness, Perceived Easy Of Use and Attitude explained this intention, and confirm the power of this model in predicting this adoption despite of its low variance ( $R^2 = 16\%$ )

This communication will generate a useful knowledge on tourism IT adoption that could help policymakers to succeed in tourism IT strategies. It shows them the most important factors to consider whenever an IT solution is supposed to be used by hotels. They must give special attention to hotels that are the potential users of this solution in order to better assess their needs and understand their expectations before choosing and implementing IT within their organisations.

The sample size represents the main limitation to this research work and could have bias results. Future work should consider a more accurate representation of the sample. Moreover, other constructs should be added to extend the TAM model and enhance its power in predicting IT adoption in Morocco.

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# Identification of Instruments of the Development of Innovation of Tourism Enterprises

Leszek Koziol, Radoslaw Pyrek, and Anna Wojtowicz

**Abstract** The aim of the article is to present the concept of the analysis focused on the evaluation of the innovative capacity of the company. The starting point for its assessment of the potential of innovative companies operating in the tourism industry, with regard to the innovation of the company. An important research tool to analyze the relationship between resources and abilities that shows a causal relationship between these categories. Describes the procedure for measuring the qualitative innovation capacity of enterprises. The article presents the results of empirical research on innovation 12 tourism enterprises. It was found that the key determinants of this ability are labor and managerial competence in innovation, and by working jointly with our customers in terms of knowledge, processes associated with the creation and use of knowledge and the use of IT tools. In light given their own empirical research results, as well as the predecessors research results can formulate a thesis that companies compete creation of innovation, as well as innovative capacity. The evaluation of the innovation can be useful in establishing the competitive position and strategic enterprises of the sector.

**Keywords** Innovation • Innovative potential • Capacity to innovate • Tourism businesses

**JEL Classification** M00

## 1 Introduction

The aim of cognitive (methodological) article is to present the concept of the analysis focused on the evaluation of the innovative capacity of a tourist company. The starting point for its estimation is the innovative potential of the surveyed enterprises, while the reference is a system of innovative enterprise.

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The practical aim is to present the results of empirical research. The basic problem presented in the article is to identify the determinants of innovation potential and assess their effectiveness as a prerequisite for the development of the innovative capacity and innovation support tourism enterprises. Formulated in this way, the aim of the research needed to develop the concept of diagnostic analysis aimed at evaluating the potential and innovative capacity of the company. The key research tool is the analysis of the relationship between resources and the capacity showing a causal relationship between these categories.

In the presented concept, the following thesis:

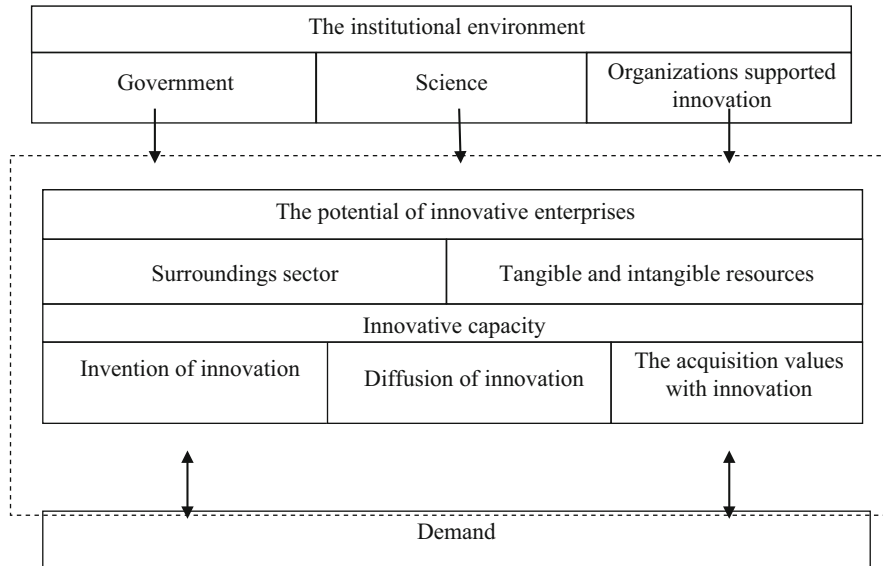
- Innovative capacity is a function and system evaluation criterion of innovation enterprise and projections possibility of speeding up innovation activity.
- Innovative capacity can be seen in the forms of partial (which correspond to the determinants of this ability), it can also be included in aggregate form for the company or the industry.

In the presented concept we assumed that innovation is any of the assumptions beneficial, creative and original change in different areas of the organization, requesting novelty and progress in relation to the existing situation, assessed positively in the light of the criteria for the effectiveness of the organization. On the other hand by innovation (innovation system) means either the potential for innovation companies and its capacity for innovation. As a refinement of this concept adopted thesis CM Hall and AM Williams, according to which, the innovation system is organized and positioning of actors, i.e. Companies and other organizations that participate in the generation, diffusion and application of new (foreground) useful and bringing economic benefits manufacturing process (Hall and Williams, 2008).

Such an approach to the essence of innovation and innovation is based on an interdisciplinary and multidimensional approach that takes into account the causes and effects of relationships with effects on different phenomena and processes and the development of innovation. In turn, the study of the system innovation organizations require a new perspective on this subject: extension of the field of analysis of the problems of innovation understood as a potential innovation on the one hand and at the same time, issues of innovative activity, i.e. The innovative capacity, creativity and diffusion of innovation on the part of the other.

The potential of innovative enterprises defined as a set of socio-economic, shaped in the development of the company, forming the base for his innovative activity. In particular, these are developed resources such as tools, processes, structures, relationships and other factors inherent in the company (Davenport & Prusak, 1998).

It should be noted that the potential for innovation is also determined by the environment sector, mainly market and therefore the company with customers, competitors, suppliers and cooperators (including above all the relationships that link the company with its key stakeholders), especially since innovations occur. They are discovered at the interface with the market. A significant impact on the institutional environment has the potential, in particular the development of new



**Fig. 1** The innovative potential and innovative capacity within the innovation system

technologies, social changes, change the shape of the market, regulations, and other (Fig. 1).

Both the innovative potential of the company (resources developed in the past), as well as innovative capacity, understood as suitable methods, skills and abilities developed the current use of resources,<sup>1</sup> determine the effectiveness of the companies in the field of innovation (innovation performance).

By taking issue's capacity for innovation, it must be stressed the importance of knowledge in its creation. It is above all the knowledge accumulated by the company during the organizational learning, knowledge of deliberate creation, allowing for the effective use of innovative potential (resources) for its innovation, knowledge and knowledge management included in the patterns and economic pragmatism which is the major causative agent of progress and favorable changes is the ability of an innovative company. Modern organizations are constantly looking for significant and lasting links between knowledge and knowledge management and innovative capacity, and even attempts are made to identify and determine the effects of various forms of information and knowledge on the kind of innovation.

<sup>1</sup>The authors deal with this subject explain that this is the ability to create something new or significantly changes, the operation in a way that exploits the ability, see Hilami, Ramayah, Mustapha, and Pawanchik (2010).

## 2 Stages of the Research

As part of the presented analysis concept of innovation companies, distinguished research in the proceedings following steps:

1. Identification of the subject and scope of the analysis
2. Measuring the quality level the innovation capacity
3. Model of the innovative capacity of tourist enterprise

### *2.1 Identification of the Subject and Scope of the Analysis*

In order to assess the innovation capacity of enterprises, conducted surveys, which were attended by 316 business entities in the region of Malopolska. Among the respondents distinguished 12 companies operating in the tourism industry. The study was conducted in the years 2012–2013. Analyses show that the surveyed companies belong to the SME sector. In the case of more than 40 % of companies employ less than 50 employees. Most of them are hotel and catering businesses, 17 % are enterprises recreation and sports, and 8 % of transport. The analyzed companies operate in the international market or regional (after 42 %), 16 % of companies operating on a national scale.

In the questionnaire included questions about general characteristics of the company, identify the number and type of innovation, forms of cooperation between enterprises in the field of innovation and knowledge, changes in the market or increased competition, which affected the competitiveness of tourism enterprises, as well as questions about the description of the significance of legal regulations, and—most important—the essential characteristics of the company—its determinants of innovation—i.e. tools, processes, relationships, competence creation and use of innovations.

Innovative capacity was analyzed in aggregate form. Aggregate capacity to innovate is a synthetic criterion for assessing the maturity of enterprise innovation potential (of the system) and merges into a single formula the innovative capacity of the partial figures given in Table 1.

The issue of the development of the innovative capacity of the company is seen in two characteristic dimensions: innovation potential and the innovative capacity, consisting mainly on creating new products (innovation, creativity) and applying it in practice (diffusion of innovation). Correlates the various dimensions are the sphere of change and development, i.e. Areas containing a specific reference to the embodiment innovation. Table 1 shows the determinants of change and

**Table 1** Determinants of development of innovative potential of tourism enterprises

Determinants	Components	The number of indications	
		Number of enterprises	Number of enterprises %
Managerial competence and labor	Knowledge of foreign languages	11	92 %
	Time of training	8	67 %
	Investments in training	7	58 %
	Ability to use modern technologies	4	33 %
	Level of education	–	–
Modernity infrastructure	Methods of communication within the company	7	58 %
	Level of utilization of the infrastructure	7	58 %
	System information system	1	8 %
	Database	–	–
	Type of IT system	–	–
Organization of work	Culture of innovation (the issue of formalization)	11	92 %
	Infrastructure to support decision-making process	5	42 %
	Rewarding for innovation	4	33 %
	Forms of work organization	4	33 %
	Types of employment contracts	1	8 %
	Collaborative solving problems	–	–
	The existence of R & D department	–	–
	Internal connections between workstations	–	–
External cooperation on innovation (knowledge alliances)	Cooperation with other entities	12	100 %
	The number of suppliers	12	100 %
	Scope of cooperation	5	42 %
	Sources of knowledge	3	25 %
Protection of knowledge	Clauses for the protection of knowledge	4	33 %
	Access to innovation	1	8 %
	Types of the database	1	8 %
	Legal forms used in security	1	8 %

development sphere innovative potential of enterprises.<sup>2</sup> In turn, the determinants of the sphere of change and development innovation ability of the company are those from among the determinants of innovation potential, which are used efficiently and effectively for innovation. Moreover, and perhaps most of all, in this area are the characteristic class innovation, which detailed figures are: the number and types of innovation, e.g. Product innovations, process, organizational and marketing, business performance achieved in the short and long term, and others.

## ***2.2 Measuring the Quality Level the Innovation Capacity***

Measuring the quality level the innovation capacity requires an assessment to verify. Rating checking is to indicate to what extent the company is achieving its goals (functions) and meets certain requirements. The formula assessment to verify the relationship is expressed by the facts enterprises (S) to the pattern (M)—state model. Thus defined evaluation is also a tool that checks the normalization of evaluation criteria by which it is possible to assess aggregate.

The evaluation process uses the innovative capacity of normalization type of aggregation point. It was assumed that the pattern score for each subcriteria assessment (component) is 1 (scale positive) and 0 (negative scale). If you score most subcriteria (s) of the determinants it is positive (i.e. positive scale 1), the qualification of the determinants of innovation potential of the company is positive.

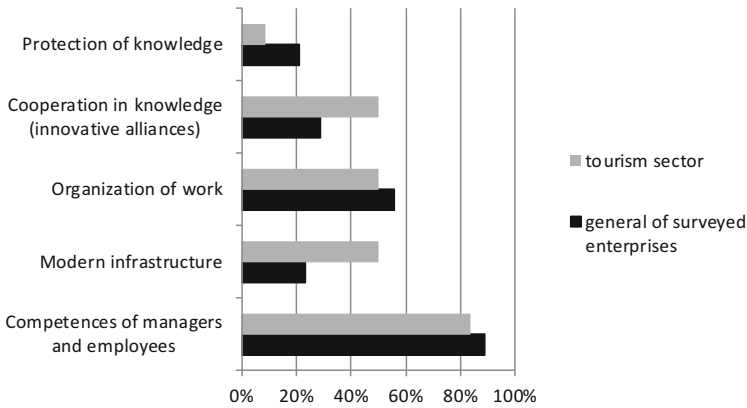
According to the adopted classification of determinants of innovation potential, an analysis of the factors affecting the degree of the innovation (innovation capacity of) companies (Fig. 2).

The study shows that among the most important determinants of innovation, are managerial competence and labor. In the case of the tourism industry, over 80 % of respondents indicated to have skilled personnel whose competencies can be used in the process of innovation (innovation competence). Half of tourist companies pointed cooperation in knowledge management, work organization and infrastructure of modernity used as important instruments for creating innovation. Only one company has taken action in the field of protection of knowledge generated in the

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<sup>2</sup>The specified set of determinants of innovation potential separated, among many environmental variables and resource organizations by analyzing the factors of influence. Those of them indicated that a significant relationship of cause and effect have been and will in the future. In the process of identifying them they used a number of different sources of information. Those relating to the environment include. Statistical data, special reports, research findings and expert opinions predecessors. With respect to the resources of the organization The views of managers and professionals surveyed enterprises. The main research tool was a questionnaire and an interview with managers and professionals. The collected comments and statements were the basis for the selection of determinants of innovation potential of the company.





**Fig. 2** Determinants of innovation capacity of enterprises of the tourism industry against the background of the determinants of the innovative capacity of the entities of the Region of Malopolska (Kozioł, Wojtowicz, & Karaś, 2014)

organization. In turn, the comparative analysis showed that cooperation and better IT tools are used to create innovation in companies of the tourism industry than in the overall respondents included business entities (Sahinidis & Kavoura, 2014).

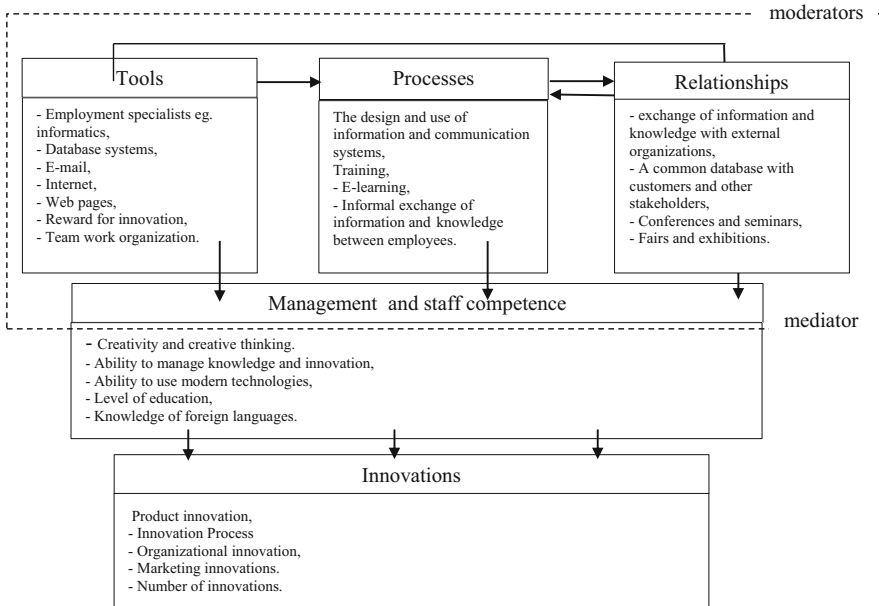
### 2.3 The Presentation Model of the Innovative Capacity of Tourism Businesses

In the next stage of the analysis separated the innovative potential of the ingredients that have relatively the greatest impact on the capacity for innovation. They were considered key determinants of this capacity (Fig. 3).

Current literature emphasizes the importance of innovation in the manufacturing sector as opposed to the service sector. The research presented in the article assumes that appropriate resources to stimulate innovation in both sectors in different ways, depending on the situation. For this purpose a model of the relationship between the circumstances and the level of innovation and efficiency of the organization, i.e. The concept of variable intermediate (mediators) and regulating (administrator).

To identify mediating variables, as well as to verify the theory innovation capacity of enterprises, conducted in the final stage of the innovativeness of interviews with experts. On the basis of modified model’s capacity for innovation.

In the model’s capacity for innovation should pay attention to relationships which are formal in nature (common database with partners, specified in the contract scope of cooperation). However, in interviews caller also indicated formalized nature of this form of relationship—the exchange of information in solving problems.



**Fig. 3** The modified model of the innovative capacity of the company (Koziol, Koziol, Wojtowicz, & Pyrek, 2014)

### 3 Conclusion

The article presents the concept of analysis aimed at assessing the impact on the ability of the innovative potential of innovative enterprises (innovation capability) and their innovation (innovation performance). Also described is a procedure for measuring the quality level the innovation capacity of enterprises and provides steps to verify this ability. This analysis can be used m. AI. to test the ability of development of various objects, i.e. businesses, industry, region, or the economy. As a special area of analysis activities of the company constitutes a field examination procedure, the purpose of which is to assess progress in all or selected areas of business activity and programming changes and the development of this activity.

Presented a new concept of enterprise innovation system, whose essential elements are innovative potential and innovative capacity of organizations as determinants of invention and diffusion of innovation, allows on the one hand assessment of the progress in all or selected areas of innovation enterprises, on the other hand allows you to program and plan its dynamics and shape in line with the strategy and business model of the organization. Based on the presented results of the research it can be concluded that the essential determinants are capacity development of innovative employee and managerial competence in innovation, and by working jointly with our customers in terms of knowledge, processes associated with the creation and use of knowledge and the use of IT tools.

In view of given their own empirical research results, as well as the predecessors research results can formulate a thesis that companies compete creation an innovation, as well as innovative capacity. It was the development of this capacity rises to the rank of primary determinants of survival and development of the company. The evaluation of the innovation can be useful in establishing the competitive position and strategic enterprises of the sector.

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