

# **Reflection on tourism**

**Prof. Fabio Cotifava**

Mantova (Italy) May 2010

## **Introduction**

In today's society, it seems that a growing number of tourists are no longer interested in the traditional tourist destinations, the so-called "mass tourism". On the contrary, the modern tourist seeks out local culture, local traditions and is interested in creating a good rapport with the place visited. As a consequence it is reasonable to state that: *A place that satisfies the expectations of the tourist, and promotes the forming of good relationships, is a place that the tourist will remember positively and wish to return to.*

To achieve this outcome, the tourist needs to be naturally disposed towards accepting new ideas and concepts, ready to participate in new experiences and interact with others. The elements that promote and sustain interpersonal relationships also need to be present in the destination visited. A tour operator that wishes to develop these characteristics, that can utilise the natural rapport as a basis of exchange between residents and guests for the common aim of maximising the use of the local resources, should base itself in the community, employ local residents and promote small, family-run businesses.

This interpretation of the tourist phenomenon, that can be defined as "artisanal" is at odds with the "industrial" version of tourism, in which standardised packages prevail and local resources are exploited to the limit with the aim of maximising profits. The direct consequence of this over-exploitation of local resources is that a serious dilemma is imposed on everyone involved in planning the development of the area. Tourism is perhaps the only sector that by its very nature cannot be decentralised, being permanently linked to the characteristics of each area in question.

The future of tourism therefore depends on the ability to conserve the natural and cultural resources which now clearly represent the true added value of any tourist destination. This makes sense in principle, but is difficult to apply in practice. In

contrast to strategies designed solely to maximise profits, in which the rules to be applied are almost always clearly defined, sustainability depends on many factors, which in some instances turn out to be incompatible with each other.

The development of sustainable tourism therefore requires the ability to manage these variables and their effects, to maintain the right balance between them in a way in which everyone involved receives the maximum benefit possible, within the regulations imposed in order to conserve the territory.

This is not an easy task as there are many variables to consider, which present themselves in many different ways. It is often possible to manage internal variables from within, while it is necessary to wait and observe the effects of external variables, in order to redesign the strategy based on the new parameters. This is a particularly complex subject, and it is extremely difficult to define rules and principles which are valid in every situation.

The current research, the fruit of 20 years of collaboration with the tourist industry, limits itself to providing practical suggestions to develop a method of development for tourism in the context of rules for social sustainability in the so-called "marginal zones". The results obtained will be verified by a sample selection of small tour operators, local companies and non-profit agencies based in the rural areas of the Balkan mountains of Serbia, Macedonia and Bulgaria.

\*\*\*

The research is divided into four parts, each of which covers a different topic.

### **First Part**

Some of the concepts behind the tourist phenomenon are discussed, these will be covered in the following sections: Chapter 1 - The Tourist Vision, Reasons for Tourism, Conclusions. Chapter 2 - The Regional Identity of the Destination, Conclusions. Chapter 3 - Models for Organising the Regions, Conclusions. Chapter 4 - Tourism in Europe, Conclusions.

### **Second Part**

An overview is presented of the most effective ideas with regard to the various forms of tourism: Chapter 5 - Forms of Tourism, Conclusions. Chapter 6 - Sustainable Tourism, Conclusions.

### **Third Part**

The objective of this section is to form indications based on general concepts which can bring about a series of interventions at various levels designed to link the economic realities of a region with sustainability: Chapter 7 - Sustainability and Development, Conclusions. Chapter 8 - The management of small local operators, Chapter 9 - Recommendations for interventions.

### **Fourth Part**

The last section is dedicated to the verification, in the field, of all that has been observed in the first three parts: Chapter 10 - Check list, Chapter 11 - Collection of information, Chapter 12 - Analysis and evaluation of data, Chapter 13 - Elaboration of an articulated series of recommendations for sustainable tourist development in the region under consideration.

## **FIRST PART**

### **Chapter 1**

#### **Notes on the History of Tourism**

##### *Greeks and Romans*

The tourism that represents one of the principle phenomena that characterises modern society is the result of an evolution that had already begun in the classical age. There exist numerous accounts that describe how the ancient Greeks travelled to sporting events, games or to religious destinations. The first types of holiday were taken by the Romans, for example, the Patrizi family spent part of each year in their villa in the country, while the lower classes spent their free time in the stadiums and amphitheatres. The concept of hospitality was born in this period, in which strangers were welcomed as Roman citizens, although they were of course received in private homes.

##### *The Medieval Age*

During the medieval period tourism declined steeply. The only non-military journeys made were pilgrimages, and the only forms of hospitality offered were from monasteries, which offered lodgings to travelling pilgrims.

The economic development and population increase recorded towards the end of the medieval period were augmented considerably by the number of travellers who were mostly immigrating to the urban centres where the first universities were situated. In this way the first structures for receiving guests were formed, for example, inns and public houses.

##### *The Renaissance Period*

The reforms of the 1500s that undermined the existence of Holy Mary and the Saints caused pilgrimages to totally disappear. At the same time in Europe new attitudes were forming in the upper classes, travel was perceived as a means of demonstrating cultural awareness, social status, independence and freedom, particularly the first grand tours made by the English nobility during the fifteenth and sixteenth century.

### *The Eighteenth Century*

The idea of a cultural voyage for purely social reasons was reinforced during this period. In fact, the education of young noblemen of the aristocratic and intellectual classes was considered incomplete without the compulsory tour which took in the historical sites of European culture.

The young nobles spent around three years visiting the principle historical and archaeological sites of France, Italy, Germany, Switzerland and the Netherlands. During this period the tour changed from being a form of education to an experience which prepared the young men for future life and helped them learn to form useful social networks. The education of the gentleman was rounded off by an experience which no school could offer, but could be obtained through travel.

### *The Nineteenth Century*

In spite of the economic decline of the aristocracy, the grand tour remained an almost exclusive prerogative of the upper classes. Although it was not affected by industrial development, it determined fashions and fashionable lifestyles.

### *The Twentieth Century*

The expansion of free time and the establishment of tourism even in the lower classes redefined the stereotype of the tourist, which became quite different to the image of the noble, aristocratic traveller of the nineteenth century, now in decline. In this way, mass tourism was born.

### *Tourism today*

In modern society tourism represents, above all, a way to escape the masses and to reaffirm individuality. The options available to tourists are therefore wide ranging and of many forms, to satisfy every possible need.

On a worldwide level, one of the characteristics of the tourist market is the high level of diversification caused by the absence of geographic limits, it brings business opportunities and there is the possibility of starting up without a large capital investment, among other advantages.

## **The tourist vision**

The term "tourist vision" is used to refer to the overall effect of various images, symbols and ideas that influence the choice of holiday destination, which once made is eagerly awaited. These symbols and images originate from the recesses of the culture of each individual, and are formed from the sediment of various archetypes and stereotypes. In this way, every traveller creates his own expectations for any one holiday, forming an internal image for any destination that might be considered. This image plays a fundamental role in the final choice of destination. It is influenced by photos published in holiday brochures which evoke an idyllic holiday scenario in the imagination, that calls to the individual and arouses his hidden needs and desires. This implies that the image that potential tourists have of a certain place is of fundamental importance to the success of the tourist industry. One particular aim is to fulfil a need to realise these images, which are different for each individual, to turn the desire into a concrete reality, as if to show that with the imagination, the fantasy truly becomes reality, the holiday has already begun. The tourist vision can thus be considered as a transitional space within which the internal and external dimensions of the trip are connected. While there is a wealth of literature available on this subject, there still appears to be an opportunity to revisit the 5 elements that are most frequently observed in the tourist vision of a normal individual:

- *Return to nature* - the imagery that brings to mind real life, healthy living, and authenticity. It stimulates the need to push away the pretence and the superficiality that often accompanies modern living
- *Bringing the group together* - the trip is seen as an occasion for socialising in a spontaneous way, that comes out of sharing an experience with others, in a new environment
- *Forming groups* - the consideration of "us" as opposed to "them"
- *Sociability* - the journey evokes community spirit, all the components of the group are equal to each other, a contrast to daily life where the identity of an individual is often defined by their social status.

- *Different forms of social interaction* - where individuals play at "what if". The holiday is seen as an occasion where relationships with others can be redefined, perhaps playing at being someone else and temporarily assuming another identity.

These aspects and behavioural considerations, even if they are generalisations, must be taken into consideration when interventions are carried out, at each level:

- *macroeconomic* - during the general planning for managing tourism in the locality
- *microeconomic* - when defining individual company strategies

### **Reasons for tourism**

There are many different theories to explain why millions of people go in search of far-off places for a temporary period. One of these is based on research identifying an optimal level of stimulation, which is present in all types of tourists (Iso-Ahola 1982). Nevertheless, to speak of optimal levels seems inappropriate, given the difficulty of defining them in a quantitative manner. The value changes from person to person on the basis of numerous factors generated from their present and past experiences. Of the many potential factors, there are two which appear to be the most prevalent:

- the stimuli to which the individual is subject to in day-to-day life
- personal predisposition

Consistent with what has been established, it seems more appropriate to speak of a perceived sense of health and well being, rather than optimal levels of stimulation.

*Stress*

*Sense of good health and well being*

*Boredom*

This brings us to the conclusion that there doesn't in fact exist a theoretical holiday which is objectively boring, or universally stimulating, but the level of psychophysical intensity perceived is personal to each individual, and linked, as we have seen previously, to the expectation of the tourist and the type of lifestyle

followed by that individual. This brings us to conclude that tourism can also be seen as a way to minimise exposure to, or avoid altogether, unpleasant daily situations linked to various different factors and events.

Tourism allows the individual to escape from the daily routine and to overcome difficult moments that he might otherwise encounter.

Crompton and Bruschi in 1979, and Pinzauti in 1991, identified some ways in which tourism manages to resolve the internal imbalance caused by unpleasant daily routines:

- *Evasion of the perceived daily routine* - this happens in various places different from the norm ( by the norm is meant routine, family environment, place of work)
- *Exploring yourself* - new situations outside of the family or work environment can represent occasions to improve your self-awareness
- *The search of relaxation* - reduces the psychophysical tension caused by overactive daily lifestyles
- *Prestige* - the holiday is a way to express your social position, your financial stability and also your cultural awareness
- *Regression* - behaviour is less rational and rigid, this allows freedom from social constrictions
- *Strengthening family ties* - family relationships are reinforced through simple activities (for example playing cards or other games) which are often neglected by the over-busy daily life, which doesn't allow for free time
- *Improvement of social interaction* - new environments encourage new behaviours in the tourist, different from the norm, that can help reduce in individual insecurities
- *Imitation* - the necessity to conform to the trends of the moment
- *Satisfaction of curiosity* - raising standards of education creates the need to find new methods of learning and improving your personal growth
- *Realising the dream* - the tourist tries out the life that they can only ever dream about, or that is unsustainable on a day to day basis

Another factor that has a strong influence on the tourists' reasoning is the age of the traveller. There is study on this topic that describes how the motivations of an average individual change as his ages increases (Gibson & Yiannakis, 2002). The motives of tourists from three different age categories are described in the following table:

Age category	Motive for tourism
33 - 40 years	Lifestyles are becoming more stable. From the tourist point of view this translates to a demand for a holiday with a purpose, favouring cultural experiences or acquiring new skills.
40 - 50 years	With the likely improvement of economic possibilities obtained during this period of maximum expansion of the working phase, the need to demonstrate social status, and/or cultural interests, develops.
50 years +	With the reduction in physical ability, individually organised, tiring activities are abandoned in favour of safe, secure places, organised trips. The concept of a point of reference assumes a fundamental role.

By uniting the results of the two research projects we arrive at the following table:

Age Category	Way in which the individual resolves internal imbalance
33 - 40 years	Satisfaction of curiosity Imitation Realisation of a dream
40 - 50 years	Satisfaction of curiosity Prestige Search of relaxation Realisation of a dream
50 years +	Satisfaction of curiosity Prestige Search of relaxation Strengthening of family ties Exploration of yourself Realisation of a dream

This table shows that the only ways of resolving internal imbalance not influenced by ages are:

- Satisfaction of curiosity
- Realisation of a dream

## **Conclusions**

The tourist vision and tourist motivations are the main factors in determining the tourist's choice of destination.

Both concepts are linked to subjective variables that change over time, therefore while results of almost any research project undertaking on this topic are of general value, they cannot consider all possible variables involved. In the end, every test should be carried out on a concrete example, individual by individual. In spite of this, there are indications of general relevance, which help us to understand, foresee and therefore manage the effects of tourism, in the process developing trust on all sides.

## Chapter 2

### Regional Identity

Every region is distinguished by its defining characteristics, every locality possesses specific qualities linked to its natural heritage, the presence of artistic sites and monuments, the cultural traditions and folklore, the terrain and the tourist infrastructure, that all combine to form the regional identity of a destination. In other words, the way in which people and/or things belong in a specific place, its character. If a place has these characteristics it is reasonable to assume that it can become a successful tourist destination. It transpires naturally that these elements, the determining factors, are perceived by the local population as an integral part of the cultural identity of the region.

It is important to stress that the identity and identifying characteristics of a region are not just its physical assets or advantages, on the contrary, these can become tourist attractions only thanks to the significance and functionality they possess from the point of view of the local population. Those which we can define as determining factors, which help form the identity of the place, can be effectively divided into the following four categories:

- The terrain
- The artistic and cultural heritage
- Local history and traditions
- Cultural events that take place in the area

The ability of the region to attract tourists has a direct correlation with the factors that make up its regional identity. The way in which these factors combine together and present themselves changes the potency and structure of the regional identity. In geographical terms the regional identity is comparable to a definitive label that allows any one geographical zone to be identified by means of its distinguishing characteristics. The area becomes recognisable for its personality, which can be picked out from all others. Different experiences in the field of tourism have extensively shown that a strong identity and a high level of self-awareness produce great advantages in terms of competitiveness and the enhancement of the proposal which is sought after by the more discerning, experienced tourists, and is also prized by less experienced tourists. A strong

identity that enhances the unique characteristics of the proposal also creates a type of guarantee for the investor, it protects against the risk that tourists will choose another destination.

### *Italian Research Project*

A recent investigation carried out by the National Institute of Tourist Research on a sample of the Italian population represented in the following tables confirms that a direct relationship exists between the local identity and the possibility of development.

Composition of the analysed sample:

Gender	% of sample
Male	63
Female	37

Age	% of sample
18 – 35	20
36 – 45	30
46 – 55	30
Over 56	20

Level of Education	% of sample
Secondary School	16
College	50
University	34

Type of employment	% of sample
Contractor	44
Executive	13
Employee	17
Trader	10
Other	16

The research has provided the following results:

- Within the local community exist people who are more mature and have a higher level of education; these people are more aware of the regional identity of the area in which they live. Younger people are generally less well-informed and more likely to be distracted by current trends and fashions.
- In general, the local populace feel that the regional identity of the area in which they live is unknown to the outside world. They anticipate tourist

development that will work towards improving communication and promoting the area

- The regional identity helps increase the prominence of the area and therefore its development in terms of tourism opportunities. A strong identity increases the likelihood of the area being chosen by tourists as a holiday destination.
- In many cases a gap is revealed between the actual regional identity and that which is perceived by the tourist. At times the tourist focuses solely on the more obvious aspects, neglecting those which require a greater effort to understand, or require a more liberal attitude and readiness to accept the unusual. The tourist forms an impression of the destination visited from one or more aspects, including monuments and/or the natural surroundings that stay in the memory. The common factors of the tourist's impression of the territory, hence its perceived identity, are always almost its natural resources (for example the scenery, clean water etc) while it is difficult to associate the regional identity with the tourist products. Therefore the need emerges during the planning of tourist activity in the area to link the resources, the services offered, the promotional strategies and the knowledge of how the tourist views the region, while at the same time promoting the region as a holiday destination to the outside world.
- The regional identity is synonymous with quality. This can have a relevant influence on the considerations of the tourist's search. The list of UNESCO sites is considered in the research as a potential symbol of quality identifying a place. In particular, it has emerged that the inclusion of an area in the list of UNESCO represents a valuable opportunity for the whole region to in terms of visibility and positive publicity, one that above all must be fully exploited to emphasise the regional identity and link it to the concept of excellence.

To summarise, the regional identity must be considered an essential element and an important point of any marketing strategy of the territory. One point needs to be clarified: No place possesses a fixed, unchanging identity, but instead

demonstrates different aspects according to the typology and requirements of the tourist. An area presents multiple facets according to the different viewpoints of different individuals and the varying requirements that are placed on it (Italo Calvino).

The regional identity is therefore considered and managed in its entirety, without making any assumptions or having any fixed preconceptions, in this way critical analyses can be developed which aim to anticipate and create new models of hospitality and new tourist proposals to apply to the region.

### ***Risks of misuse***

The utilisation of the local identity for tourist purposes when it is developed by external agencies for a proposal aimed at general use can be the cause of situations of imbalance, which in turn are capable of generating situations of risk. Of these, the most frequent are:

- 1) The single minded search for “beauty” and “perfection” on the part of the tourist or operators. The site does not have the ability to positively manage these types of external inputs. They encourage the growth of situations dominated by current trends and fashions with the consequent impoverishment of the cultural heritage and local customs
- 2) The regional identity is seen as a type of nostalgic vision of the traditions that anchor the territory totally in the past, instead of taking action to make links to the present. In the most extreme cases it is possible to observe the separation between the past and the present in an area
- 3) The type of tourism in an area creates an identity based solely on elements of its past, which no longer exist. This quickly reduces the ability of the identity to effectively represent the true spirit of the region. Founding the tourist development strategy using links with the past, if not managed correctly, risks nullifying the medium-term advantages that should rightly follow those in the short term.
- 4) The exclusion of the local population in favour of the tourists. Tourism, more than just being a good opportunity for economic

development of the local community, is also an opportunity to build and maintain over time good relations with the tourists, who become temporary citizens of the visited locality as part of their holiday. It is hence necessary that authentic experiences are offered which centre upon the lifestyle of the host community and allow for the building of relationships. The residents are the first point of sale of the tourist proposal and their ability to welcome guests, as well as to conserve the typical culture, is an integral part of the tourist experience.

### **The role of the institutions**

#### *Conservation of the territory*

The success of an area as a tourist destination is strongly linked to the state of the environment, the quality of which constitutes an essential ingredient of the “ideal” holiday. For the modern tourist, the environmental component often forms a basis of the whole experience, as a result it becomes an element which needs to be communicated and marketed effectively, included in the principle selling points to bring out the identity of the area.

To this end, local administration needs to ensure their work is aimed towards:

- Promoting the correct usage of the primary resources of the area
- The constant monitoring of the way in which primary resources are used
- The adoption of techniques for separating waste for recycling
- The recovery of brown-field sites
- The development and support of local associations involved in environmental conservation

#### *Identifying specific characteristics*

The lasting development of tourism necessarily requires that any work done on the territory is carefully planned and monitored at each stage of the process.

The first step in accomplishing this objective, one of the priorities of local administrative institutions, is to identify the specific characteristics present in the locality and to define the minimum requirements that an element should possess in order to be considered as one of the characteristics that distinguish the area.

In other words, this is the task of mapping these elements that constitute the natural resources that define the precise, distinctive identity of the locality.

Owing to the necessity to obtain full co-operation from all parties involved in the use of the chosen indicators, it is fortunate that the realisation of this phase coincides with the encouragement of participation between the tour operators and the local community.

Consequently it will be the task of the administration to find methods to record the results in a quantitative and qualitative manner, putting into place where appropriate the necessary procedures to adjust operations being carried out and/or their objectives, thus providing constructive feedback.

#### *Enhancing the identity of the local heritage*

By means of actions aimed at the enhancement of local history, typical products, rarities, authentic traditions, often represented by the organisation of public festivities, or with the commemoration of historical events and religious festivals, team spirit can be generated between the tour operators in the area, as well as pride and a sense of belonging to the community. This can be a way of encouraging the co-operation of the local community in the project.

#### *The medieval villages of central Italy*

An example of this is the rediscovery and enhancement of a selection of medieval villages in central Italy as an important tourist site. The greater part of these small villages are perceived as little-known places, linked to the past, immersed in nature, far from main traffic routes and characterised by one main element such as a castle, or a prominent historical building.

The tourist associates particular symbolic values to these localities, which can be divided into the following categories:

- *Originality*: in the local handicrafts, dress and architecture
- *Authenticity*: of the food, new flavours to discover
- *Tradition*: customs and folklore

### **The role of the local tour operators**

#### *Preserving the heritage*

The ability to offer ever more real and instinctive experiences and sensations, discovering new territories and the feeling of being outside of the more

commercial forms of tourism, is now focused on as the central element of the modern face of tourism. It is assumed that the local tour operators are capable of using the resources in the most efficient manner and at the same time accommodating guests from different cultures and with different lifestyles.

In this way a true exchange of experiences is created, and real relationships are formed, that if mismanaged by means of invasive actions that do not respect the interests of all involved parties (the tourists, the locality and the resident population) can generate some of the situations of risk previously described. In addition to this, it is necessary to emphasise that situations of uncertainty or loss of identity can present themselves when the local community is subjected to generalised changes. When consumer trends change, local traditions tend to fade, the collective memory shrinks and the idea of pursuing the interests of residents and guests becomes that of pursuing personal interests. It is necessary to universally accept that the diversity, nature, history and social rapport represent the heritage of a region, and it is the duty of the local tour operators, together with the administration and the community as a whole to preserve this heritage, not just for their own benefit, but as guardians of the interests of the future generation. The cultural heritage, that defines the collective identity, constitutes an irreplaceable resource, that by its very nature cannot be recreated once it has disappeared, and therefore needs to be defended and looked after to guarantee its benefits in the fullness of time.

#### *Emotional aspects*

The knowledgeable tourist generally tends place more importance on the emotional sensations and sensory stimuli, therefore the tour operators and local community need to be capable of creating opportunities to build relationships, meeting and sharing. The modern culture of acceptance requires, in fact, the capacity to weave interpersonal relationships and to allow the tourist to experience sensory extremes: the third millennium tourist does not want to passively experience the holiday, but wants to have a full experience of the area visited. One of the principle attractions of a region is its ability to tell a story, necessitating the involvement of the residents in the recounting of the folklore of

the area and of the people who have lived there. The authenticity of a place does not transmit itself automatically.

A product that can arouse the emotions of a tourist and provoke lasting sensations must form a part of the experiences which are included in the tourist proposal of the region. A concrete example of the role played by the tour operator in heightening the emotional sensations experienced when the tourist enters a shop, or visits a wine cellar or a novelty workshop can be observed. In these moments the tourist is not just purchasing an item, but is experiencing a feeling that when inserted into the general context of the holiday contributes to give the sense of the locality.

The accurate description of the processes carried out by the tour operator are not only useful in facilitating the eventual purchase, but in involving the tourist in a form of family atmosphere, inside of which the tourist can truly live the lifestyle of the area, and experience the traditions and local customs. To this end, the role of the tour operators and the general community, the waiting staff, the local police, tourist guides, shop keepers and hotel staff appears fundamental, all must be capable and willing to satisfy the curiosity of the tourist, to explain local knowledge and thus create those emotions in the tourist that will form part of the memory of the holiday.

#### *Community feeling*

It has been stated that the modern tourist is attracted by the elements that together form the regional identity of the destination, and that during the holiday seeks to feel a sense of belonging and to be integrated into the culture of the area which is formed from the history, typical produce, customs, dialects, scents etc. To feel integrated and part of the culture of a place is therefore a condition that the operators must first share amongst themselves, as well as with the tourist. The local operators must carry out interventions in a way designed to emphasise the region and its recognisable characteristics so the tourist does not benefit from just one aspect, instead the whole program of hospitality should be contained in one integrated proposal.

## **The importance of cultural events and folklore**

When speaking of the identity of a region, of its characteristic traits and traditions, it is important to remember the many initiatives organised by residents that become formidable ways of enhancing the area. Of these, the most important are surely the public festivities and demonstrations that involve the whole community: from individual citizens and local institutions to local businesses and tour operators. Often a local event, for example a handicraft fair, a gastronomic evening or a carnival, functions as a catalyst on the choice of destination by the tourist. This is true for the majority of cases of national tourism, but if the event is included as part of an integral experience, it could also attract overseas tourists.

### *The situation in Italy*

A recent investigation undertaken by Isnart on a sample of more than 10 000 Italian tour operators revealed that, in spite of the presence of events held in an area, and the fact almost 50% of companies interviewed had recorded increases in the number of customers (an estimated growth of between 5 and 10%, while the other half recorded increases of over 50%), the direct participation in events by even the more receptive tourists today still seems to be a limited phenomenon. Surveys show that the contributions to events from tour operators can be divided into the following groups:

%	
50	Publicity of the occasional event aimed at customers already in the vicinity
29	Discounts and promotions of the event for customers
14	Organisation of a stand representing the company at the event
7	Financial sponsorship of the event

### *The case of Krusevo in Macedonia*

Krusevo is a city in Macedonia known for its revolt against the Turks in 1903, after which it proclaimed itself 'The Republic of Krusevo,' lasting just 10 days. Traces of this episode can still be seen today in the city centre: two museums, a monument and the historically preserved house of Nikola Karev, the president of the republic. In 2008 a group of citizens composed of local tour operators and civilian institutions created a project intended to reproduce the events that characterised those days in 1903. In July of each year around 200 citizens

dressed in the costumes of the period spend two weeks in the roles of the main protagonists and re-enacting those 10 eventful days of the Macedonian revival. The project raises awareness of the principle element of the local identity of Krusevo, universally considered in Macedonia, and also within the consciousness of the people that live in the city, as a symbol of national liberty. The results obtained in terms of tourist participation during the first two editions can be described as encouraging, but it is still too early to be able to make judgements on the future possibility of reaching the levels of local development forecast by the organisers. At present, the effects of the initiative still contain a large amount of novelty value and originality. It seems appropriate to emphasise that this demonstration, which is based on events belonging to the past, if not included within a wider catalogue of options for tourists, that clearly should not be limited to a type of museum/film that comes to life for a couple of weeks, risks becoming a scenario constructed and controlled by the organisers for financial ends only, and will not be able to represent the true regional identity to the tourist over the course of the few days of the holiday.

*The Valley of the Roses in Bulgaria*

In 2006 the Kalya Group, an Italian tour operator specialising in cultural holidays in the Balkans, surveyed around 500 of its clients, Italian travel agencies, to discover what elements identify Bulgaria in the imagination of the potential tourist. The data collected show that for the majority of respondents the factors that identify Bulgaria are: the roses and the orthodox monasteries.

For 60%	Bulgaria is the source of rose oil-based products
For 30%	Bulgaria is known for its orthodox monasteries
For the remaining 10%	Bulgaria is almost completely unknown

The analysis of the data from the turnover of the Kalya Group in recent years confirms that the image of the area is directly related to the attraction that it exercises on the tourist. Over 40% of Kalya’s customers that visit Bulgaria chose holidays that include the International Festival of Kazanluk, or other events that occur in the same region during the flowering season of the roses. Of these, the most favoured by the Italian tour operator are those organised in the Karlovo

region during the weeks preceding the festival of Kazaluk. It is interesting to note that from the surveys carried out by the Italian tour operator on the tourist's enjoyment of a holiday that includes the festival of Kazanluk, or a 'secondary' event in other areas of the Valley of the Roses, it emerges that these are most appreciated by groups of tourists from the major urban centres of northern Italy with a medium to high level of education. From the questionnaires completed by customers at the end of a holiday, we see that the principle factors that attract tourists to the 'secondary' events are:

- Authenticity
- Being able to mix with the residents
- Absence of tourist trappings, which the traveller associates with artificiality, illusion and pretence

The 'Valley of the Roses' event represents the sum of all the work carried out that supports the economy of the area all year round.

For this reason, the Bulgarian event has only a minor risk in respect to the Macedonian event of falling into the 'commodities' category which as we know consists of the transformation of religious rituals, ceremonies, festivals, and ethnic rites into 'tourist products' created to live up to the expectations of the visitors. When scenes are created that attempt to reproduce real life for the benefit of the tourists, authenticity and spontaneity are lost, a stage set has been created instead. From the research undertaken on the so-called 'secondary events' of the rose valley it is possible to observe that there is an alignment between the sensations experienced by the tourist and their original expectations: to feel like a guest at a party organised between friends, for each other, is the result of the labours on the part of the residents and represents their daily lives, it is not a 'special dish' cooked for the occasion. The strong sense of authenticity evoked in the tourist is the real motivation for the trip and provokes feelings of genuineness, reality and uniqueness.

## **Conclusions**

According to the opinion of the third millennium tourist, when a place has the ability to associate the belonging of people and/or objects to itself, it is reasonable to assume that it can be a successful tourist destination. The regional identity cannot therefore be the result of planning strategies imposed from above, but must be completely accepted and shared between the residents and local operators, who will, together with the local administration, be the ones to put in place and manage operations that guarantee the conservation of lasting development conditions in the area. The tourist today expects a warm welcome, within which the emotional aspects form an important part. The locality therefore must be able to identify itself within the tourist system, that is, to have a collection of integrated services available to the tourist, characterised by its originality and coherence within the locality. Within this welcome the role of the local administration is also important, in determining and above all conserving the necessary conditions to consolidate and nurture over time the relationship between the locality, the local tour operators, and the local community.

## Chapter 3

### Models for Organizing the Territory

The implications of tourist development on a given territory have interested researchers for the greater part of this century. In Italy tourism began to be mapped out in the years leading up to the Second World War, by Toschi.

This same Toschi, at the Italian Geographic Congress in 1957, proposed the first spatial model of tourism in which three zones were identified:

- The departure zone, which plays an active role
- The arrival zone, which plays a passive role
- The transitional zone

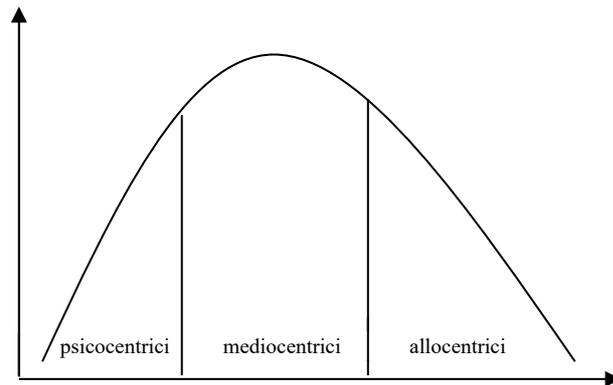
In 1967 Campbell proposed a model referring to people who travel for holidays and/ or recreational purposes, and distinguished three types of relocations for people who live in cities:

- For recreational purposes, different recreational areas are identified around the cities
- For holiday purposes, different destinations are identified
- For recreational and holiday purposes, recreational centres that also include other areas to create a complete complex

In the eighties Lundgren identified four distinct tourist destinations in terms of their geographical and political and economic position.

- The metropolitan areas, which can entertain large amounts of traffic and large numbers of tourists travelling within them
- The suburbs, which interest tourists, some of which come from the metropolitan areas
- The rural areas which are of interests to tourist, who also come to complete the visit of the area
- The natural environment, far from the big cities

According to the psychographical profile of Plog (1974) the distribution of the tourist population can be described with a Gaussian curve, with respect to the different types of localities. Analysing the personality of the tourist allows us to define three types: psychocentric, allocentric and mediocentric.



*Psychocentric tourists* favour safe, secure destinations that are not too distant and organized packages, they do not seek adventure.

*Allocentric tourists* go in search of less traditional tourist destinations, they enjoy independent adventure holidays.

*Mediocentric tourists* sit between the two extremes. They gradually visit the zones already explored by the allocentric tourists, but do not take the initiative in going in search of unusual destinations. The majority of tourists fall into this category.

The presence of allocentric tourists is synonymous with scarce tourist development and usually corresponds to the initial phase, the discovery. With the increase in the number of mediocentric tourists, mass tourism approaches, while the presence of psychocentric tourists expresses the consolidation of the destination within the tourist market.

In 1977 Miossec explained the structural evolution in time and space of a tourist locality, also taking into account the impact on the territory. Miossec proposed a regionalisation of the stages of tourist development, analysing the methods of progressively conquering the territory and the structures that emerge. Distinct phases are identified:

- First phase - the territory is unknown, or considered uninteresting
- Second phase - the territory slowly becomes less isolated
- Third phase - tourist initiatives intensify, the residents and local administration start to consider the benefits of tourism to the local economy

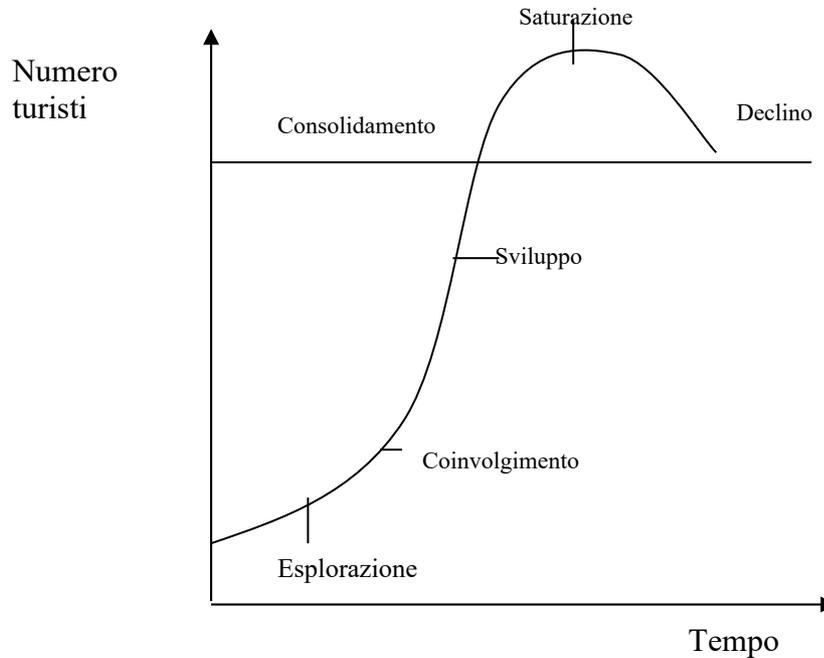
- Fourth phase - space becomes allocated for tourism
- Fifth phase - tourism arrives

Miossec is in agreement with Plog on the fact that once a peak of tourism is reached, it is then followed by saturation of the locality. Traffic and congestion increase and pollute the local environment, and the better quality classes of tourists leave in favour of other destinations. At the first sign of these crisis symptoms, Miossec recommends interventions aimed at re-establishing the cultural values and authenticity of the region.

Butler (1980) developed a model representing the life cycle of a tourist destination, made up of four phases:

- *Exploration*, the future tourist destination is only visited by a few pioneers that come into contact with the local community. There are no forms of tourist packages available
- *Participation*, the resident population starts to sense economic opportunities. Some rudimentary tourist packages start to form
- *Development*; local resources are exploited by means of investment of foreign capital. The onset of mass tourism begins.
- *Consolidation*, the rate of growth of tourist numbers starts to slow down, with respect to previous levels. Tourism becomes the main local activity, but the first symptoms of degeneration due to exploitation of the natural environment start to show. This leads to the departure of the most prized group of tourists and forms of opposition to tourism start to arise from the local community. This situation can further evolve in different ways:
  - *Stagnation*, the diminishing quality of the tourist package in the face of a continual increase in mass tourism. The high pressure on the territory results in an overload, an idea that we will see is one of the principle arguments for sustainable tourism.
  - *Decline*, the locality becomes less competitive than other destinations. The number of tourists grows, but the quality of the product collapses.

- *Recovery*, the local operators and administrators put in place interventions which are aimed at rejuvenating the region, for example enhancing resources that were previously neglected.



### Conclusions

In spite of the extremely artificial form used to demonstrate the territorial models, the results are evident - tourism follows a life cycle similar to any other product: after a period of rapid development, it necessarily follows that the rate of growth decreases. If the management of tourist activity is trusted to the tourism "industry" it is likely that this phase will be revealed by means of a strategy characterised by cutting back the tourist package in an attempt to recapture the lost market by lowering prices. In this brief period there is a clear acceleration of the degradation of the environment and an unsustainable level of exploitation of local resources.

## Chapter 4

### Tourism in Europe

This paragraph is dedicated to a brief synthesis of the results of a statistical survey undertaken by Eurostat in 2006 on some tourism indicators in European countries. Regarding the length of the holiday, for simplicity only the data collected on trips of 4 or more overnight stays will be recorded, the so-called "long stays".

#### *Age of the tourist*

Age category	Percentage of the total population (%)	Percentage of the total number of tourists (%)
15 – 24	15	15
25 – 44	35	38
45 – 64	30	32
Over 65	20	15

The graphic shows that the distribution of the age of the tourist is very similar to that of the general population and that more than a third of tourists are between 25 and 44 years of age.

Taking into consideration the demographic trend (Europol 2008) it can be predicted that by 2040 the over 65 category of the European population will represent 27% of the total population. It is therefore reasonable to assume that by 2040 more than 20% of tourists will be included in this age category.

#### *Duration of holiday*

Eurostat has divided the overall number of holidays (2006) into two categories based on the number of overnight stays: less than four, and four or more. The approximately 900 million holidays taken in Europe in 2006 are distributed fairly equally between the two categories.

Number of overnight stays	Total number of holidays (in millions)	%
Less than 4	462	51.3
4 or more	438	48.7

#### *Duration of holiday and age of the tourist*

Distribution by age of tourist of the number of holidays with four or more overnight stays

Age category	Total number of holidays (in millions)	%
15 – 24	66	15
25 – 44	166	38
45 – 64	140	32
Over 65	66	15

It is noticeable that the distribution of the age of the tourists who go on "long holidays" is the same as that of the tourists with respect to the total European population, this demonstrates that all the age categories go on holiday with the same level of intensity.

Other data show, however, that the over 65 category dedicate more time to their holidays than the other categories: about 24.3 days per year, the overall average is 20.5 days per year. The average length of each holiday is also greater for the over 65s, 11.7 days compared with the overall average of 10.1 days.

#### *Destinations*

Destinations	Total number of holidays (in millions)	%
National	267	61
Abroad	171	39

Other data also show that more that 70% of Belgians, Irish, Slovenians and Luxembourgers choose a foreign holiday, while more than 70% of Spaniards, Italians, Polish, French, Portuguese and Romanians choose to holiday within their own country. This could mean that the dimensions of the country influence the choice of its citizens, in small countries more people choose to go abroad, while in large countries people holiday internally.

#### *Number of holidays each year and age of the tourist*

Age category	Number of holidays per year
15 – 24	2
25 – 44	2
45 – 64	2.1
Over 65	2.1

### **Modern and post-modern tourism**

The desire to visit distant places fuels itself through geographical descriptions, pictures of different destinations and unknown regions. The tourist visions therefore contribute in a definite manner to the forming of mental maps and therefore the vision of a distant place. This implies that there is not always a

distinction between places of tourist interest and places of cultural value. The tourist localities evolve in parallel with social evolution; they are currently following two principle tendencies: modern tourism, and the tourism which will be defined in this paragraph as post-modern. Modern tourism is the form of tourism which discovers and enhances destinations, laying the foundations for the identifying essence as a vision for what the tourist requires. Through modern tourism distant places are visited, contact is made with the local culture and customs of those places.

*The modern tourist* goes in search of new destinations, diversity, and is motivated by a desire for authenticity. His ambition is to find an unexplored corner of the planet that has not been subjected to any form of modernisation. Alongside this desire for adventure and search for the exotic, the need for protection against danger and uncertainty, those aspects often found in unknown and distant places, is always present. This phenomenon could be described as: adventure and search of the unfamiliar, but without surrendering modern comfort and security.

*The post-modern tourist*, however, seeks out the reconstruction of other places and of past times in artificial spheres, in which simulated landscapes are created on an imaginary scale. The post-modern tourist space is configured into a sterile, ideal internal environment separated from every physical context, inside of which exists a mix of tourist images and ideals. While modern tourism takes place in physical localities, becoming a part of their identity and experiencing their physical attributes, post-modern tourism does not require a specific physical setting, the tourist space is instead constructed in the interior of closed or semi-closed environments formulated of images of distant, uncluttered tourist landscapes and is spawned from the tourist vision that motivates the masses of international tourism. Some of the more striking examples of post-modern tourism are the tourist complexes and Disney theme parks built in Europe and the United States, but also included in this category are the so-called “designer cities” or outlets that adapt a commercial strategy within an idealised city in order to create large pedestrian oases, boulevards, a small Italian piazza, where the shapes and colours buildings are in harmony with each other and flowerbeds

in bloom frame the shop windows. Currently modern tourism is growing steadily and there are no signs that this trend will reverse itself in the near future, but forms of post-modern tourism are multiplying. The forms of post-modern tourism possess several advantages for the involved parties that allow us to hypothesize their future development. Three main advantages can be identified:

- They offer a greater level of security
- They are less devastating on the territory, compared with modern tourism which occurs in the “open” and has a greater likelihood of clashing with other users of the territory
- These microcosms, if well constructed, are capable of matching up the expectations of the tourist, often a tourist-spectator, with the attractions on offer during the restricted time frame of the holiday.

### **Globalisation**

Globalisation fundamentally consists of the passage between open and closed systems, from protected and enhanced systems to those which can be interacted with freely, from isolation to interdependence, from being static to being dynamic. The global scale opportunities which characterise globalisation and are directly connected to the tourism sector are:

- The geopolitical concession: state borders become more permeable, this is a multicultural and global asset which leads to a progressively centralised state
- The technological opportunity, primarily in the fields of communication and transport, allows information to penetrate to the most hidden corners of the Earth and of man, systems are created based on interaction, mobility, activity, that build conditions for tourism
- The opening up of new economic markets produces an extraordinary increase in trade, but it is also necessary for new members to assess their own products, the quality of service, their advantages and their potential, to be in step with the rest of the world. It is necessary therefore to react with timeliness to the changes, to anticipate them, to avoid remaining permanently obsolete.

- Large scale global migration, when considered in terms of the international labour market, incidentally renders the national efforts for remedying unemployment pathetic, sterile and completely obsolete if attempted without a view to the necessary global prospects
- The possibility of effortlessly making contact with almost the entire human population with information emitted from just one source
- The biological opportunity that crosses distributions of species, frees up and accelerates genetic systems with the use of biotechnology and genetic modification, which has great potential for the enhancement of local varieties of plants and animals, the rebirth and revitalisation of rare species and the rebuilding of traditional landscapes
- The global ecological aspect, of which the probable changes in climate represent only one issue, barriers between ecosystems are broken down, which multiplies the resources available, though this also brings waste, to empty, often uninhabitable territories

Today the crisis which is devastating western economies is debated everywhere, but the moment at the base of the crisis is the moment in which there are more dangers to avoid, and, more importantly, more opportunities to grasp. Globalisation does not just even things up, but develops within any context an infinite number of possible tourist proposals, all different, but all applicable to an area. The region in question is seen as the raw material on which the tourist proposal is based, rediscovering an infinite variety of places, situations and all the aspects not necessarily put together as a package.

Globalisation gives rise to the conflict between institutional tourist systems which run on regulations excluding local culture and traditions, and the local community which cares for the natural and cultural heritage of the area, which results in a specific development. Important decisions need to be made at this stage, consulting all of the available information. It seems to the writer that the emphasis on diversity is essentially part of a larger strategy to face up to the inherent risks of the opportunity and of change. There is a strategy found in biological, cultural, social and economic evolution which is described, in terms of popular wisdom, as not putting all your eggs in one basket. Diversity

modulates the flow of information in varying ways and adapts it to specific needs. The diversity actually consists of the collection and grouping of local, specific information, biological or cultural, created during times of successive changes and that will survive only through continuing change. The diversity is information and must be recognised as such, it must be understood in interchangeable terms.

### **Conclusions**

The demographic indications confirm that the European population is aging steadily. Today, just under 50% of tourists are 45 or over, but in 30 years time the over 65s will represent around 20% of all tourists. This means that the figures involved at almost any level of tourism must be aware of the needs of this segment of the population and make an effort to satisfy them. A number of “excluded” nations, local communities etc. will be one of the probable effects of globalisation. They will be all those who did not want to or were not able to adapt to the changes, losing in this way market quotas, development opportunities, and in extreme cases, social stability. The demographics of globalisation will surely produce effects in every environmental sphere and it is unthinkable to not be involved. The only difference will be in our ability to manage or endure the changes.

## SECOND PART

### Chapter 5

#### **Forms of Tourism**

The Balkan Peninsula, Italy and a large part of Europe in general have always been interested in tourist fluctuations. As we have seen, for many centuries, these journeys took place mostly for military, commercial and religious reasons, although there were a few examples of people who travelled purely for the love of adventure. It is worth noting the tales of the famous Turkish explorer Ecliya Cheleby, they describe in abundant detail many cities and locations in the Balkans during the Ottoman period. However, a significant acceleration of the tourist phenomenon has been observed since the beginning of the last century, principally due to the industrial revolution and the consequent development of commercial exchange (business travel), and then due to economic development and improved means of transport. In these years tourist fluctuations were represented principally by the so-called “mass tourism” of the Eighties and Nineties, and reached their peak with the creation of specialised destinations dedicated to the anticipation of the “tourist-consumer”. Side by side with this “all inclusive” tourism, towards the end of the Seventies, small local activities designed to welcome visitors started up in a few insignificant corners of the planet, based on the nuclear family setting rather than on a business structure. They were the pioneers of the type of tourism that is now referred to as alternative. So alternative tourism was founded more than thirty years ago, but yet there are still differences of opinion and contradicting ideas on the application of this form of tourism.

#### *Mass Tourism*

By mass is literally intended a large number of people. So mass tourism is the form of tourism created in order to transport and manage large volumes of people. From this descends all the obvious commercial, operational and various

other consequences that determine the characteristic substance of this form of tourism. Some considerations are obvious:

- Large numbers require greater capital investment and higher levels of management and professionalism in each phase of the productive cycle: the planning and programming, the control and management of the company systems, and the management on a day to day basis
- It is superfluous to emphasise that these qualities and prerequisites, which are present only within the reality of big enterprise, which consists of large companies that often use resources and capital which originate from investors that do not have personal ties or emotional attachments to the area in question.
- As it happens for all the other economic sectors, even tourism when produced in large quantities requires a high level of standardisation of processes and the organisation of systems, in order to obtain products which are in line with the expectations of the tourist-consumers.

In many cases only the minimum necessities are offered (food, board and transport) the level and composition of which are based almost exclusively on the price band chosen by the tourist. The transformation of the holiday in the tourist industry has obviously excluded the culture and local community from the production process that is in fact carried out inside a defined scenario of the same business organisation. This is the concept behind the organised package holiday where the tour operator constructs the product according to their own strategy and company culture, but always with the aim of economic profit, that then administers directly to the client. Economic profit seems therefore to be the principle element towards which the operating rules of industrial tourism are aimed, the effects of which can internally drain the system, or can transfer themselves to those nearby. On the base of what has been said, we arrive at the concept of mass tourism:

*Mass tourism or traditional tourism normally refers to large tourist structures, generally managed by large companies or foreign tour operators that offer services with a content aligned with international standards, without any interaction of the tourist with the local reality.*

During the holiday a reproduction of the lifestyles of the countries of origin are offered to the tourists, the concept of an intensely organised package holiday is integrated within this context, which frequently leads to a loosening of any links between the place visited and the daily life which takes place there. In this way the tourist becomes a cog in the tourist machine that is all-encompassing, leaving no opportunity for interaction with the local community, which is in contrast with human nature that has need of interpersonal relationships, which often constitute the real reason for going on holiday.

### *Passive Tourism*

The label “mass” does not only derive from the large numbers of people that are involved, but also the passive connotations that characterise this form of tourism. Mass culture identifies the passiveness of the service users, therefore mass tourism is founded on the official recognition of the behaviour and on the absence of critical facilities of the consumers. The holidays constitute a characteristic and significant element of modern life, but at the same time they risk being transformed into vehicles of conformism, and so the holiday, in addition to being an indicator of social status, becomes an obligatory social activity. Mass tourism becomes therefore a collective behaviour within which the tourist assumes his socio-cultural role – that of the consumer.

### *Alternative Tourism*

In spite of the fact that a universally accepted definition of alternative tourism has not yet been identified, some key traits are present in almost all of the interpretations of this expression. Some of the most common are given below:

*Alternative tourism normally indicates the forms of tourism that emphasise contact and awareness of the local community, their way of life and the natural environment (Smith and Eadington, 1992)*

*Alternative tourism is a form of tourism consistent with the natural and social values of a location and that promotes development of relationships between the local community and the tourist (Wearing and Neil, 1999)*

*Alternative tourism is based around small local businesses (Carter, 1993)*

*Alternative tourism respects the environment and local culture and interacts with other economic sectors, which means that the territory becomes less isolated* (Newsome, Moore and Dowling, 2002)

To summarise, we can deduce that tourism is alternative when the following traits are present:

- *Small-scale agencies involved.* Normally this implies zones on the margins of the popular tourist circuits, characterised by rural economies and microstructures organised mostly on a family basis.
- *Small numbers of tourists are managed.* The organisational limits of the business, the highly specialised nature of the tourist proposal, the necessity of conserving the local heritage, signify that the offer is only available to small groups of tourists, which in the majority of cases are composed of people that know each other, who belong to the same nuclear family or who are otherwise related.
- *Tourist proposals are more personalised.* The type of offer represented by the local micro-operators is structured on the human factors that by nature are able to adapt the offer to the needs and expectations of the clients which as we have seen change over time and from individual to individual.
- *Natural environments are respected.* The natural environment is considered an irreplaceable element of the holiday, therefore its conservation becomes an essential condition to guarantee the future of development for tourism.

*Alternative to what?*

Alternative in this sense literally means something that substitutes for something else, this or that. The logical question to ask is: What form of tourism is “alternative tourism” actually alternative to? Considering that today tourism is generally divided into mass tourism and alternative tourism, the answer is obvious: alternative tourism is the alternative to mass tourism, which is also known as traditional tourism. In this way the position of alternative when compared with mass tourism is obtained from a simple process of subtraction based on the assumption that in the presence of only two elements, if it is not one

of them it must be the other one, but this gives no information of the nature of the results obtained. The word “alternative” suggests options, but it is not stated if the different options produce effects which are:

- Opposing
- Similar
- Equal

The type of effect produced depends on the context in which the word “alternative” is used. Two examples are shown below:

- When speaking of alternative routes on a map, alternative in this case means two different paths which arrive at the same destination, the final result is the same
- In the tourist setting, the final result is decidedly different. It would be impossible to maintain that a holiday in an all-inclusive resort produces the same effects as a holiday spent in family surroundings in a rural village, taking part in the daily life of the local community

From these examples it would appear that within the tourist environment, alternative means an option with opposing effects. To understand the true significance of the word “alternative” in the field of tourism it is necessary to place it in the context of the historical period when it was first coined, about 40 years ago. Towards the end of the Sixties the term “alternative” became associated with all forms of existentialism, often traceable to specific ideologies, that promoted lifestyles, methods of consumption, and forms of social relations that contrasted with those so-called “dominant” values normally accepted by society. Hence the birth of alternative medicine, alternative exercise, alternative politics, alternative cuisine, etcetera. In Western Europe these were the times of the young rising up against the establishment (1968) and the word “alternative” was not associated with the idea of substitution, but of that of contrast and the shattering of the general stereotypes that had been accepted up until that point.

After all this, there can be no doubt that by “alternative tourism” we mean all possible forms that contrast with the dominant form of tourism represented by the so-called “mass tourism”. The following tables synthesise the distinctive traits of these two ways of interpreting tourism.

<b>Feature</b>	<b>Mass Tourism</b>	<b>Alternative Tourism</b>
Proposal	<i>Large commercial organisations</i>	<i>Micro-organisations</i> Enterprise organised in small business or non-profit organisations
	<i>Foreign investment</i> <i>Non local management</i>	<i>Local investment</i> <i>Local management</i>
	The administration is entrusted to personnel who are not from the locality	There are affectionate links between the manager and the local area
	<i>High level of professional input</i>	<i>Scarce professional input</i> Particularly in management
	<i>Programming</i> Management work from a base of a complex of programmed activities	<i>Improvisation</i> Tourist proposals do not follow a pre-arranged program
	<i>Rigidity</i> Pre-packaged products are delivered by the tour operator. Choices are made from a selection which is always defined by the operator.	<i>Flexibility</i> The content of the holiday adapts itself to the needs and desires of the clientele.
Requirement	<i>High volumes of tourists</i> The package is designed to accommodate and manage large numbers of tourists	<i>Small numbers of tourists</i> The organisational structure is only capable of accommodating small numbers of tourists
	<i>Generality</i> Involves the “mass” of tourists	<i>Specificity</i> Principally aimed at the so-called “mature” tourists
	<i>Absence of autonomy</i> The tourist purchases a pre-packaged product	<i>Independence</i> The tourist chooses unusual destinations of his own accord in the attempt to become more autonomous
	<i>Passive role</i> The tourist is subject to the plan defined by the tour operator	<i>Participating role</i> The tourist is stimulated into playing an active, integral part in the proposal, he is no longer seen as a passive subject
	Nature of the product	<i>Standard</i> Standardised levels which are universally required and accepted in international settings are applied in the creation of the company product.
<i>Predefined</i> Proposals consist of products		<i>Defined ad-hoc</i> The experience unfolds progressively

	predefined by the company. The tourist can choose from a combination of options selected by the operator	over the course of the holiday, according to the dialogue between hosts and guests.
	<i>Rigid</i>	<i>Variable</i> The content of the offer varies widely, the products are highly differentiated.
	<i>Prevalence of Capital Structure</i> The capital component is prevalent within the product. The choice of the customer depends on the structure and setting rather than on the people who operate the holiday.	<i>Prevalence of personal aspects</i> The product is constructed by the people who deliver it. The operators of the local organisation assume a fundamental role in the choices made by the client.
	<i>Invasiveness</i> The management and the mobilisation of large numbers of people require the building of new infrastructure, the management of large volumes of traffic, including private and public transport, waste management etcetera.	<i>Respect for the environment</i> This is the basis of the proposal, in spite of this, as we will observe, the phenomenon of tourism always causes changes in the environment
	<i>Banality</i> The prevalence of proposals that have a completely commercial content trivialise the experience of the area	<i>Originality and Uniqueness</i> The proposals include aspects of a social, cultural, religious and historical nature
Local relations	<i>Almost non-existent between tourists and the local community</i> The holiday takes place almost totally within a pre-constructed, artificial zone without any contact between customers and the local community	<i>Strong links between tourists and the local community</i> These represent the basis of the tourist proposal
	<i>Few links between companies and local suppliers</i> The tour operators concentrate purchasing on a small number of big suppliers with which they form permanent business relations	<i>The tour operators are a part of the local economy</i> A continual exchange is generated between operators and small local suppliers
Objectives and economic aspects	<i>Maximising Profits</i> This is the principle aim of capital-based societies	<i>Proportional profits or mutual benefits</i> This is the aim of the small operators and non-profit agencies
	<i>Protecting the local environment and conserving local culture</i>	<i>Protecting the local environment and conserving local culture</i> Considered the pivot on which the

	Considered a restriction on the economic development	development strategy revolves around
	<i>Profits transferred abroad</i> The wealth created does not remain in the territory in which it was produced, but is controlled by a few foreign agents who intermediate and manage financial activities	<i>Majority of the profits reinvested in the local community</i>

Regarding the transfer of profits abroad, a report written by the Onu in the early Nineties, and an analysis by C. Smith need to be considered. They point out the extreme variability in the share of income derived from tourist activity that effectively remains in the countries where the resorts are sited.

It transpires that tourism only really benefits the national economy in cases where the amount of capital leaving the country is contained (C. Smith 1992). From an investigation undertaken in 1992 carried out in several villages of the Pacific Islands it emerged that in some cases almost 90% of the income produced was transferred abroad. The preceding table showed that of the five aspects considered, profit is the only one that is common to both forms of tourism. That is correct in as far as, within a business environment, profit is the principle objective and is independent of the size, and of any other element of the enterprise. As we will see more clearly, however, the quantitative yield of profit is certainly different between a big multinational and a small, family run concern, which is actually similar to a non-profit organisation.

### **The profits**

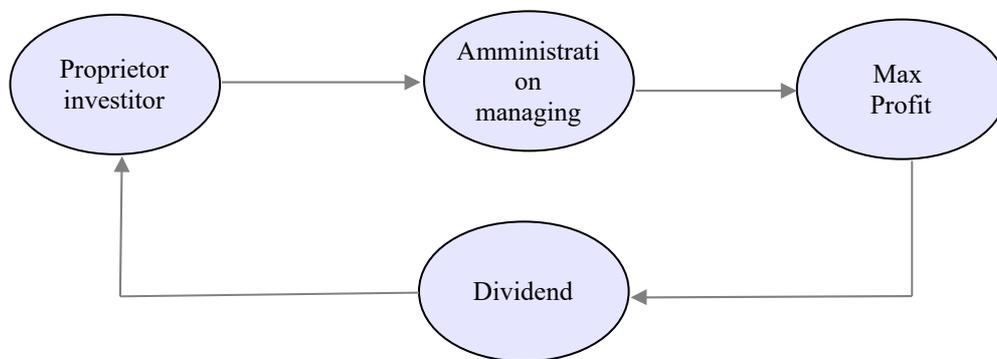
The concept of profit, aside from the arguments discussed in the following paragraphs, merits a further exploration following on from the contents of the preceding table.

#### *In mass tourism*

Large commercial corporations that adopt the juridical systems of capital-based societies represent organisations in which the local laws and also the management processes exist on a separate plane to the proprietors. Normally the involvement of the proprietor-investors in the daily life of the company is limited to the nomination of the body which is responsible for the operational

management of the company. According to universally-accepted business theories, the presupposed base of any form of enterprise is the maximisation of profits. In the case of large capital based companies this translates to the maximisation of the dividend paid to shareholders. It seems unnecessary to emphasise that the maximisation of profit means to increase returns and reduce costs. In this situation, the question should be: What are the regulations and the limits that companies should respect in the pursuit of maximising profits?

The following scheme represents the relationship between proprietors and internal management of a large commercial tourist organisation:



The proprietor-investor nominates the administration-managing body for a limited period (normally three years), their task is to achieve the maximum profit possible and hence the maximum dividend for the proprietor-investor.

The future of the contract of the administering body, which means the safeguarding of jobs inside the company, depends mostly on the results obtained in terms of profits. In many actual companies, part of the remuneration of the administering body is linked to the percentage of profits. If to this premise we add that in almost all cases the employees within the administering body do not have ties to the area, or any particular interest beyond that of the job in hand, it is easy to imagine that the regulations and limits set down by the company management will be only those which are compulsory by law, often interpreted in the best interests of the company, with the approval of local administration. There is a risk of playing the demagogue in thinking that the maximising of profits allows room for the present and future interests of the local community,

of the region and all the other factors devoid of the ability to be transformed into short-term profits.

From this there are at least two definite consequences:

- *Impoverishment of the natural environment.* Often the laws safeguarding the environment are convoluted and difficult to apply, and the savings obtained by the company by not respecting them are much higher than the penalties incurred: in many cases it suits the company to take the risk of incurring the sanction rather than building a purification plant, or making sure the processes already in place to safeguard the environment work in the way they should, or separating waste, or applying procedures which are compatible with the sustainability of the territory etc. The management has to decide between two options: bearing higher costs (for certain), or risk a probably small sanction.
- *Advantages or effects which are difficult to measure on the area.* The attempt to imagine the effects that a large resort has on the local economy of a region follows.

In the short term it is reasonable to assume an increase in local prosperity: new job opportunities, new opportunities for enterprise, and higher revenues for local administration (if the companies are not given an exemption for tax purposes as new investments, as often happens). In the long term however, all the subjects involved, publicly and privately, must face up to the negative effects caused by years of exploitation which have been produced on the natural resources, on the social fabric and on the cultural identity of the area. The future scenarios are only conjectures, fruits of logical processes which are subjective, and hence impossible to accept universally. On one point, however, there is universal agreement:

*There definitely exists a limit, which if exceeded, the resources on which we depend on today will be irreversibly compromised.*

In the following table are synthesised some proposals of the possible effects on the territory of the construction of a tourist village in a zone of tourist development.

<b>Positive effects</b>	<b>Negative effects</b>
<p><i>Job opportunities for the local population</i></p> <p>In particular unskilled labour, waiting staff, cleaning staff etc.</p>	<p><i>Impoverishment of the environmental heritage</i></p> <p>The management of large numbers of people always has invasive and lasting effects on the territory</p>
<p><i>Opportunities to create new local commercial activities</i></p> <p>Development is possible in terms of retail linked to the souvenir industry, clothing etc</p>	<p><i>Risk of losing cultural heritage, traditions and local identity</i></p> <p>The area's resources are used according to the needs of the tourist-consumers. No allowance is made for regeneration</p>
<p><i>Increase in the availability of public resources</i></p> <p>Through the payment of national and local taxes, if exemptions are not made for new investments</p>	<p><i>No new opportunities for skilled local professionals</i></p> <p>Specialists are recruited from other areas. Local professionals are forced to look elsewhere</p>
<p><i>Increase of the renown of the territory abroad</i></p> <p>Through the promotions and publicity developed for the site by the contractors</p>	<p><i>Dependence of the local community on the tourist activity</i></p> <p>This means their choices of management are always dictated solely by comparing costs and returns obtained</p>
<p><i>Development of the infrastructure with the consequent reduction of isolation of the area</i></p> <p>The necessary infrastructures are built alongside the development of tourism</p>	<p><i>Company management defines the strategies chosen by local administration</i></p> <p>Above all in situations where the monoculture of tourism prevails, the local economy and hence the choices made by the local administration are at risk of depending totally on company policies</p>
<p><i>Work opportunities in the construction sector</i></p> <p>Use of unskilled labour and the services of local building firms during the construction of the site</p>	<p><i>Transfer abroad of end profits</i></p> <p>The majority of the profits are transferred to the countries where the headquarters of the companies are sited.</p>
	<p><i>Neglected opportunities in terms of local production and business activities</i></p> <p>Companies favour large, international suppliers that are not based in the locality</p>
	<p><i>Standard of living of the local community falls</i></p> <p>This occurs above all during the construction period of the site: heavy traffic, pollution, the disposal of large quantities of waste, including toxic waste, cause problems for local residents</p>
	<p><i>Limited growth in terms of professionalism of the local labour force</i></p>

	The local population are employed to carry out menial tasks, they do not gain new professional skills
	<i>Work is seasonal and consists of economic activities which are driven by tourism</i> Activity is often linked to the climate of the area
	<i>Companies search constantly of ways to reduce costs</i>  The logic of the maximisation of profit requires constant research into ways to lower production costs. Considering the large weighting the wages of the unskilled workforce have on the total cost, it is probable that measures introduced to cap expenses will be aimed at this sector. Some consequences are: Reduction of salaries, flexible working hours, casual, “cash in hand” jobs without benefits

### *In Alternative tourism*

Mass tourism, because of its intrinsic characteristics already discussed, cannot take place in any environment other than that of large commercial enterprise, but alternative tourism can be orchestrated by small companies, for example family-run businesses or non-profit agencies. The profits therefore assume a less central position in alternative tourism, this is shown in practice by companies that naturally pursue mutual aims and are therefore outside the logic followed by companies that pursue maximum profits, or by investors that are justified economically only as entrepreneurs, and by the few collaborators they involve in their activities. The term “proportional profit” has been used previously, by this is meant profit which is necessary and sufficient to induce an entrepreneur to start up a business, or to continue running it. When the exhaustive search for profit does not represent the sole aim of the business, the conditions that potentially allow tourist activity to be based upon values and principles, which for many reasons are difficult to fit into a purely economic setting, are created. It is only within this context that the local operators and the community can be convinced, or at least be willing, to not consider the care of the natural environment, of the culture, of the popular traditions, let alone the interpersonal relationships between the requirements and the tourist offer, as a constraint of

development, by which is also intended economic yield, but a necessary condition for lasting growth of the territory. Considering that in structural terms European tourism is to a great extent characterised by the presence of small and medium-sized businesses (in 1997 the SMEs of the tourist sector were 7.4% of the total of the SMEs in Europe) the frequency of which it is cited implies that it represents the only environment imaginable for a development of the region managed and controlled by local communities. The invasive effects caused by tourism were already becoming clear towards the end of the Eighties, for this reason many countries adopted policies and initiatives aimed at developing and maintaining tourism based on these principles. It is necessary however to portray a new method of organising the tourist phenomenon until the knowledge matures and diffuses that even in this sector there are limits, which if exceeded create the risk of “playing” with the future of a region and its inhabitants. Obviously this philosophy is not for the exclusive use of any one form of tourism, the forms defined as “mass tourism” could also theoretically entertain these principles, though in this case, the structural characteristics of the main players in the tourist proposals and the economic principles of maximising profits, all place a series of restrictions that in reality are difficult to overcome and are in direct contrast with sustainability.

### **Tourism and the territory**

In the preceding arguments a synthesis has been given of the probable positive and negative impacts on a territory of a new tourist village. It is necessary to emphasise, however, that almost any form of tourism inevitably produces positive and/or negative effects on economic, social and biological systems of the area, and this is independent of the efforts made by the people involved in tourist activities.

*Local planning does not therefore intervene on the nature of the effects or on their consequences (qualitative variables) but only on their intensity (quantitative variables).*

To reduce the negative effects and to increase the positive effects, according to the principles of sustainability, does not only represent a problem for mass

tourism, but is implicit in almost any form of tourism and as such is not self-determining. The following table does not pretend to cover every possible effect, but it does include some of the principle impacts, and also those which it is reasonable to assume will impact on the territory:

<b>Positives</b>	<b>Negatives</b>
<p><i>The recovery of historical and cultural assets and the preservation of natural resources</i></p> <p>The development of tourism can represent a reason for the salvage and conservation of the area, sustained also through the production of resources and the creation of interest in these objectives</p>	<p><i>Overcrowding</i></p> <p>The increase in the number of tourists present and of the economic operations connected directly or indirectly with tourist activity tend to lead to a situation of overcrowding in the area</p>
<p><i>Allows the local population to come into contact with different cultures and become acquainted with them</i></p> <p>This is an important concept, though it is often difficult to put into practise. It is necessary to state that “tourism produces riches not by exporting a product to its customers, but by importing customers to consume the product at its source” (E DeKadt 1979)</p>	<p><i>Separation of the place in which the tourist income is produced and the place to which it is allocated</i></p> <p>In organised packages often the major part of the cost of the holiday (this can be as high as 80%) is not used to pay for local services, but the transport, the commercial expenditure and the overnight stays in transit areas</p>
<p><i>Represents a multiplication of income and employment in the short term</i></p> <p>In the short term, an increase in employment and local income is always registered</p>	<p><i>Risk of losing the identity of the heritage</i></p> <p>Economic and commercial motives mean that the items desired by tourists are bought into the area and sold to them, rather than what is traditionally produced in the local area</p>
<p><i>Construction and improvement of the infrastructure</i></p>	<p><i>General price increases</i></p> <p>The influence of tourism on the general level of inflation of a country depends on how much it contributes to the GNP. This determines the increase of prices at ground level and also that of property prices, which are linked to the development of new infrastructures and/or speculation</p>
<p><i>Improvement of local sanitary conditions</i></p>	<p><i>Possible and probable destabilisation of the area in the case of total dependence on tourism in the “tourist monoculture”</i></p> <p>The so-called tourist monocultures represent one of the main risks caused by the implementation of tourism that is not well planned. In extreme cases this can cause:</p> <ul style="list-style-type: none"> <li>• Economic dependence</li> <li>• Political dependence</li> <li>• Destabilisation of the area</li> </ul>

	It is necessary to remember that tourism is a voluntary activity for tourists, while it is compulsory for the residents
	<p style="text-align: center;"><i>Increase in pollution</i></p> <p>By its nature, almost any human activity produces rubbish, and tourism cannot be excluded</p>
	<p style="text-align: center;"><i>Deterioration of cultural resources</i></p> <p>This result is inevitable when the use of resources reaches levels which do not permit regeneration of those same resources</p>
	<p style="text-align: center;"><i>Development of tourism can be to the detriment of other economic activities already present in the area</i></p> <p>There is a risk of wrong-footing the other non-tourist activities when the limited local resources used by tourists are no longer available to businesses in other economic sectors. With the disappearance of other economic activities the tourist monoculture situation arises</p>
	<p style="text-align: center;"><i>Lack of respect for the values of the local community</i></p> <p>This can present itself in two different ways:</p> <ul style="list-style-type: none"> <li>• In extreme cases aspects of ethics and morality are involved</li> <li>• In less obvious cases the local residents adopt the ways of consumption of the tourists, in imitation</li> </ul>

In 1975 Doxey furnished a model of the different phases that characterise the psychological reactions of the local community towards tourism:

- Euphoria – new opportunities and more funds flowing in
- Apathy – tourists are seen as money-making opportunities
- Irritation – as the number of tourists present approaches the limit of the capacity of the area, friction occurs over the use of the declining resources
- Antagonism – the local community sees the tourists as the source of all their problems

## **Forms of alternative tourism**

*Alternative tourism is the attempt to make contact with another culture, forming a relationship with the natural and human environment, the history and the traditions, the community and the individuals within (Corvo 2003)*

In recent decades there have been different attempts to classify the principle varieties of tourism that can be identified as alternative, understood as a new philosophy of tourism that seeks authenticity and harmony with nature. Of these: *Alternative tourism divides itself into: cultural, rural, agricultural, scientific and adventure (Mieczkoeski 1995)*

*The principle forms of alternative tourism are: soft tourism, green tourism, naturalist tourism, responsible and sustainable tourism, low environmental impact tourism and ecotourism (Galli and Notarianni 2002)*

The first definition omits some typologies that today are normally included in the so-called alternative tourism, although it can still be accepted. The second definition cannot be totally accepted. To include responsible and sustainable tourism within the possibilities signifies that it is considered in the same way as all the other types, as a mere subcategory and not an evolution of the same alternative tourism which will be considered in the following chapter. It is possible that there have been some unhappy attempts to channel the concept of sustainability into a particular case in hand, these would have contributed to the creation of the many uncertainties that in these years have characterised the meaning behind this concept. It is certain that within the label “alternative” there exist many different forms of tourism, but each of which expresses the autonomous character and individuality that forms its base, in direct contrast to the conditioning and standardisation found in traditional tourism. In the attempt to classify the various forms that alternative tourism assumes in the tourist market, it is suitable to first single out the criteria on the basis of which the analysis is developed. To accomplish this it seems reasonable to use as a measure of evaluation the level of emphasis that the various tourist typologies put on the characterising elements of the concept of marginal and/or alternative. This leads us to identify two large categories and five small categories:

- Nature and sport

- Ecotourism
- Adventure tourism

- History, culture and traditions

- Cultural tourism
- Rural tourism
- Religious tourism
- Tourism based on folklore
- Educational tourism

Since the main aim of this study is not the examination of the various forms of alternative tourism, only cultural tourism and ecotourism will be discussed further.

*Cultural tourism*

The cultural heredity of a region can be of a physical form, for example a monument, and also of a spiritual form, for example the traditions, local knowledge, lifestyle, costume, dance, culinary specialities etc. In Europe, the elements of the cultural and natural heritage can be principally found in rural areas, far from the big cities. Almost every village or small town possesses its own characteristic heritage that identifies it and at the same time distinguishes it from other villages nearby. The task of making an inventory of and conserving the immense cultural heritage of the rural areas in the whole of Europe required a considerable effort. On an international level examples which are recognised as having unique and exceptional characteristics are honoured by the inclusion in the UNESCO list of international heritage sites of mankind, that as we have seen earlier constitutes a kind of identifying brand. In Europe there exist over 200 sites of international heritage and without doubt this recognition exercises an enormous power of attraction on tourists, not only towards the specific site but also towards the surrounding area. However, even the smaller or more spiritual heritages involve such complicated resources, varied and dispersed in such a way that to register and make an inventory of them in a systematic manner is extremely complicated. In some cases it is possible to find detailed information

about the heritage sites of an area only at a local level, when private individuals or specific interest groups are involved who have studied the local heritage of the area and exert pressure to ensure the conservation of the site. In the majority of cases, however, especially if the people are younger, they have difficulty recognising their cultural heritage as something special or unique as it forms part of their everyday lives. To this end the European Council instituted the European Heritage Network HEREIN in 1999, this is a permanent information system that unites the services provided by public administration in charge of the guardianship of the cultural heritage, in particular the architectural and archaeological heritage. Its objective is to convert the paper database of the European Council on the architectural and archaeological heritage sites into an easily accessible system which is available online. The sheer diversity of the cultural heritage in Europe and the dynamism of the artistic creation represent the fundamentals of European civilisation that exemplify the “European identity”. In spite of the growth registered in the last 20 years of the numbers of tourists choosing holidays of a cultural nature, a significant percentage of European territory, categorised by the term ‘atypical tourist destinations’ is still rarely visited by tourists. From a recent analysis of some tourist statistics by Eurostat, which examined the numbers of tourists reported in 1154 European regions, it emerged that the level of density of tourism is rather variable, the most peripheral regions of northern Fennoscandia receive a very scant number of visitors, while on the other hand, Great Britain, Ireland, Benelux, Germany, Austria and Italy range from being well regarded to highly prized tourist destinations. The situation also varies widely within the country. For example, in France, even though it is one of the principle tourist destinations, some important regions receive only a small number of tourists, above all in the central zone that extends from the Belgium border to the heart of the country and to the Massif Central. Moving south, in Spain, Portugal and Greece there are vast internal areas with a reduced number of visitors, that cover from a third to three quarters of the territory. It is not surprising that the coastal areas of these countries, and indeed the whole of the European coastline falls into the category of highly

sought after tourist destinations. Some years ago a study was made on types of tourist destination chosen by Europeans. The results were:

	%
Sea	63
Mountains	25
Cultural cities	25
Countryside	23

This might explain the success of tourism in the Mediterranean, where there are beaches, but also history, and on its own receives little under a third of the total of international arrivals, obtaining around a quarter of the total income. Within the criteria that form the basis of the choice of destination, after the scenery, the climate and the price come the cultural interests and the environment.

#### *In Italy*

The choices of the Italians do not differ much from those of other Europeans, apart from less interest towards the mountains and the countryside. The archaeological sites on their own do not attract big crowds, but are considered as parts of the city where they are located, this indicates a requirement of the cultural tourism that includes around a quarter of Italian holidays. If instead the numbers of tourists present in marine localities are combined with the numbers present in the cities of interest, this totals 55% of Italian holidays and 58% of foreign visits to Italy.

#### *Ecotourism*

The development registered in recent years of holidays that are focused on the environment has prompted ONU to announce 2002 as “International Ecotourism Year”. The successful recovery of this form of tourism is partly due to the fact that it includes a variety of different activities that bring people into contact with nature, of which safaris, bird watching, trekking etc represent just a few examples (Steward 1994). Regarding the definition of ecotourism:

*The eco-tourists can be defined as sightseers in as much as they are hunters of places and sights, always in search of something new, they go on holidays which are not ordinary and not repetitive, of which relaxation and the commodity aspect are not prioritised. (Cohen 1974)*

The great success of the recovery of the national parks shows that the eco-tourist does not produce a great impact on the region of the destination and prefers to emphasise the fact that his destination is a park rather than a specific geographical area. The concept of an eco-tourist, however, does not limit its aspirations to purely biological environmental concerns, the need to discover other cultures and to make contact with the local population is also prominent in the category: I have participated in a local festival because this is a way to become acquainted with and involved in the social and cultural life of the local community. The need to avoid the usual destinations and the artificiality of the large complexes, the acceptance of risk and the desire to explore, imply that according to Plog's classification, eco-tourists are within the sphere of the allocentric category.

#### *In Italy*

Italian eco-tourists prefer European destinations that are relatively close to their own country. They prefer to organise holidays autonomously, avoiding the pre-packaged products of the tour operators. In general they do their research online and leave without pre-booking hotels or arranging visits.

### **Conclusions**

In modern society two tourist profiles emerge, and most tourists fit in somewhere between the two extremes. For the first of these the holiday is synonymous with discovery, of making contact with nature and the local population, the rejection of the traditional and repetitive holiday. The tourists who fit the second profile look for a peaceful, quiet, relaxing holiday, they are 'creatures of habit' and return to familiar, known surroundings. They trust the tour operator with the organisation of the entire holiday. For the tourists who fit the first profile, forming interpersonal relationships with the local community constitutes one of the reasons for the holiday, whereas for the second, contact with the local population is of less importance and is not sought after. These different ways of viewing the tourist experience derive the two principle forms of tourism that characterise the current market of international tourism: mass tourism and alternative tourism. The differences between them affect all aspects of tourist

activity and the objectives that are aimed towards. It is these opposing economic objectives that write the rules of the game and the relationships between the main players of the tourist proposal and the territory.

## Chapter 6

### *Sustainable tourism*

In these years when the environmental issues are assuming greater importance, to think of the mere physical aspects of alternative tourism is restrictive, and risks losing the true significance of the concept agreed upon as a possible or even the only real opportunity of investment based on local development, born of the long-term vision (we are talking about the Eighties) that covers diversity and all that has been previously discussed, and the fundamental points of a strategy of development and conservation of the well-being of all local communities.

The tolerance of the environment and the economic and social balance become in this way the foundations on which to stimulate and reinforce the concept of local development. The Eighties signalled the start of the reporting of the damage caused to the environment by tourism that as we have seen always has an effect on the territory. To oppose the trends of mass tourism, institutions and individual countries, mostly in the Mediterranean zone, started to elaborate programs and documents outlining principles of sustainable development from the end of the Fifties. One of the first generic definitions of sustainable tourism was given in 1987 from the World Commission on Environment and Development (WCED) for the Brundtland report:

*To be extremely brief, development is sustainable when it satisfies the current economic needs without compromising the ability of the future generation to satisfy theirs.*

The following year (1988) the Worldwide Organisation of Tourism (OMT) proposed a more complete definition:

*Tourist activities are sustainable when they develop in a way that maintains the essentials of a tourist area for an unlimited length of time, when they do not alter the natural, social and cultural environment and they do not obstruct or inhibit the development of other economic activities present in the area.*

In 1992, during the Rio de Janeiro summit, the famous Agenda 21 was adopted: a global intervention programme approved by the United Nations conference. The Agenda 21 identifies the tools to apply, manage and develop sustainable

tourism at all responsible levels, from public administration and tour operators to tourists and local communities. The paper particularly specifies the role of tourism in the safeguarding of the environment and the necessity to guarantee the acceptance of sustainable behaviours on the part of all subjects involved in tourism. It reaffirms that the concept of sustainable development hinges upon some fundamental principles:

- The preservation of resources for future generations
- The creation of new development opportunities for future generations
- The protection against any form of exploitation by tourism on the so-called 'vulnerable' zones
- The introduction of limits of capacity of the territory

In 1993 with the signing of the Lanzarote paper at the Worldwide Conference on Sustainable Tourism it was established that:

*Tourism must be ecologically sustainable in the long term, it must produce profit and it must be socially and ethically just in dealings with the local community*

The report emphasised that the characteristic of correctly managed tourism is that it bases itself on the ability to guarantee the sustainability of the resources on which it depends.

Suggestions were made to this end:

- Enhancement of sustainability of tourism in a global sense
- To plan for tourism assuming sustainability as a parameter of reference
- Reaffirm the role of the main parties involved in tourism
- To encourage local tourism
- To develop and sustain networks of information exchange between local operators
- Creation of an archive of existing forms of tourism which adhere to sustainability principles

The WTO paper of 1996 analyses the base principles for sustainable development, while the year after they are brought to light in the famous Berlin Declaration:

*It is necessary to monitor and manage at a local level in order to ensure the lasting development of tourism*

The same fundamental principles are emphasised for the correct management of the territory:

- Lasting tourism bases itself on the reasonable use of the biological diversity
- Tourist development must be planned in a way to respond to the needs of sustainable and lasting development
- It is necessary to avoid the development of mass tourism in regions which are sensitive from an ecological and environmental point of view
- The local community assumes a fundamental role in the projection of sustainable tourism as they are the first beneficiaries of its effects of lasting growth

During the international conference in 1997, “Tourism and Sustainable Development in the Mediterranean Basin” some measures were identified to reduce consumption of the water and energy supplies, to reduce production of waste and to promote the conservation of cultural traditions and local creativity.

In 1999 the United Nations Commission for Sustainable Development emphasised the necessity to harmonise the national strategies regarding sustainable tourism according to Agenda 21, and the Worldwide Code of Ethics for Tourism was signed. This document, approved by the WTO, provides *the guiding principles of investment to encourage the creation of responsible and sustainable development of worldwide tourism.*

In 2001 the International Conference of Sustainable Tourism in Rimini concluded with a document which recommends:

*Encouraging the participation of all parties involved in tourism, reinforcing the management, projection and planning which is integrated and sustainable, as well as the promotion of sustainable alternatives for seasonal mass tourism and interventions to remake destinations in a sustainable sense, ensuring good management of the environmental and social heritage of the localities involved and reinforcing every activity focused on raising awareness of the parties involved in tourist systems with the aim of positively promoting their active role.*

In November 2001 the European Union intervened with a publication on sustainability entitled “A Co-operative Approach for the Future of European

Tourism” in which, in order to accomplish what was established in Agenda 21, it recommends that it is necessary to

- Foresee and minimise the impact of tourism on the environment and territory
- Manage transport growth
- Promote sustainable tourism with socio-cultural development factors
- Consider co-ordination of actions and balance at all levels
- Adopt measures aimed at increasing the competitiveness of European tour operators

Also in 2001 was the VI Community Programme of Action on the subject of the environment which promoted the integration of main environmental themes of every policy contributing in this way to the reinforcement of the concept of sustainability. In the programme a series of objectives were indicated, including

- To contribute to the improvement of the quality of life and the social well-being of the local communities, also through sustainable urban development
- To guarantee an improved efficiency and management in the use of the resources including those which are renewable
- To encourage the application of that which was established in Agenda 21 even on local levels

It is appropriate to recall the Johannesburg Environmental Summit of 2002 that pressed for a large commitment on the part of the international community in the accomplishment of the programmes suggested in Agenda 21 adopted in 1992 in Rio de Janeiro.

In the situation in Italy, further to the already-mentioned International Conference for Sustainable Tourism based on Rimini in 2001, it is necessary to remember Statutory law 135 of 2001 regarding the reform of national legislation of tourism that includes in article 1 the fundamental principles and the political tools of tourism, the guardianship and maintenance of the environmental tourist resources, the cultural assets and local traditions, and also the objectives of sustainable tourist development. The aim of the regulations is that of emphasising that tourism is a phenomenon that can and must be controlled and

managed in order to maximise all its possible benefits including in terms of employment, but at the same time avoiding social and environmental relapses and guaranteeing the conservation of the resources used in tourism for their continuing use over time. Analysing the definitions proposed, it seems clear that through the concept of sustainable tourism does not represent a new form of tourism that can be fitted in alongside the already existing options, *but is a rational evolution of the concept of alternative tourism*, based on some further, and perhaps obvious, specifications, synthesised as follows:

- The economic value for the operators involved
- The duration over time of the economic value
- The safeguarding of the environment
- The guardianship and the responsibility towards the community and of the cultural values of the area

This positions concords with that sustained by Holden:

*Alternative tourism can be considered as a sort of synonym of sustainable tourist development* (Holden 2000)

*With the introduction of the concept of 'sustainability' it is hence desirable to overcome the idea of alternative tourism as a mere physical activity, instead placing it as a central element of a strategy for the lasting development of the territory, including in economic terms.*

The necessity of a development which is sustainable originates from the observation that if the current level of exploitation of the resources, above all the natural resources, is too high then it will not be possible to guarantee them for future generations (Butler 1998).

In order to be able to discuss sustainable tourism it is essential to view it as a lasting phenomenon, that is:

- It should not be based on the growth of the market requirement over a short period of time, but on the effects over the medium to long term period of the tourism model adopted
- It should be integrated into the cultural riches and economy of the area and the nearby localities

- It should be vital for the local economy that any alternative activities must seek to improve the well-being of the local community
- It should be planned keeping account of the present situation and the possible future situations
- It should participate, from the moment in which the people of the local community need to be involved in the decision-making processes regarding the interventions for the development of the territory.

### ***The loading capacity***

The sustainability of tourism is developed and managed in agreement with the sustainability of the territory to be developed (Hunter and Green 1995) This determines that the sustainability of tourism is closely linked to the 'loading capacity' of the territory (Butler 1998) which is understood as the quantitative indicator that measures the pressure of tourism on the area in question.

*By loading capacity is intended the maximum number of tourists that can visit a locality without compromising the natural characteristics and without reducing the general levels of satisfaction of the tourists (Mathieson and Wall 1982)*

*As well as environmental characteristics, it is also necessary to consider the social and cultural aspects of a locality (Pritchard 1992)*

In this way we arrive at the definition of loading capacity furnished by the WTO:  
*By loading capacity is intended the maximum number of tourists that can visit a locality without compromising the natural, physical, social and cultural characteristics of a given territory, with respect to the levels of general satisfaction of the tourists.*

Through the quantification of and respect for the loading capacity tourist programmes develop which will not cause long term damage to the natural resources, the social network, the local identity or other economic activities present in the area. The natural resource that constitutes the element that attracts tourism is often considered as a consumable, non renewable resource: exploitation by tourism of this resource determines an irreversible consumption which causes the diminishment of the attractiveness of the natural scenery and of the quality of the environment.

The quantitative determination of the loading capacity considers different aspects of the territory, including:

- The environmental character
- The urban character
- The typology of the tourist proposal
- The policies on tourism
- The needs of the local community, the local operators and the tourists

From the definitions it seems evident that the loading capacity is the result of the grouping together of individual capacities which in their turn can be expressed in terms of specific limits:

- *the capacity of the ecosystem* – defined by the availability of the natural resources present in the area: this is the physical limit that if surpassed causes irreversible damage to the natural resources
- *the socio-economic capacity* – defined by the level of social and economic satisfaction perceived by the local community in relation to the tourist phenomenon: this is the social limit that if surpassed causes the impoverishment of quality of life to outweigh the benefits of tourism for the resident population (Costa and Manente, 2000).
- *The economic capacity* – defined by the measure of satisfaction of the expectations of the tourist: this is the economic limit beyond which the quality of the tourist experience is reduced, and with it the willingness of the tourists to pay high prices.

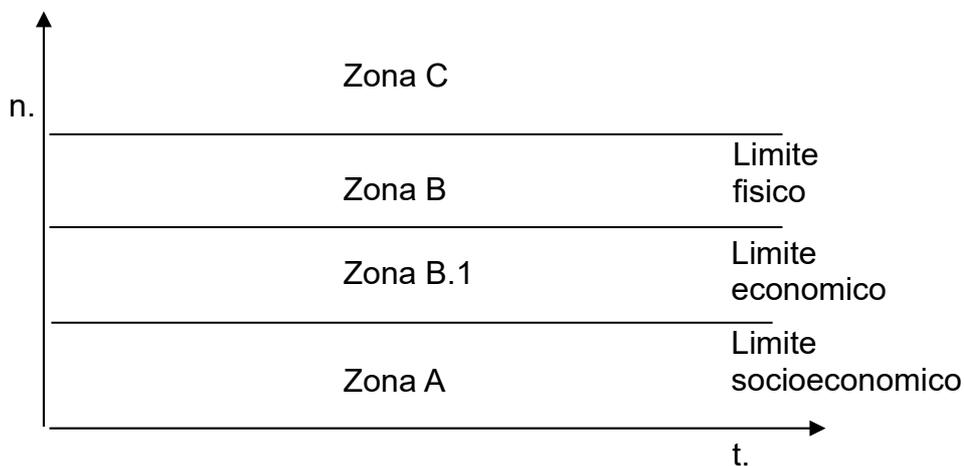
The valuation of the loading capacity is based on some objective variables, that depend on physical data and subjective variables linked to the process that transforms this data into values of well being. Accepting the possibility of determining a number or vector to express the physical loading capacity, it is appropriate to speak of intervals within which the tourist development of the territory can be categorised. The context of the analysis becomes complicated if it is possible for the fixed value to be different from the perceived value. A local community can actually perceive an obstacle as overcome independently of whether or not the physical limit is reached, certain individuals who overvalue the benefits and undervalue the costs tend to fix their own socioeconomic limits

above the physical limits. It is noted that an event has economic relevance only if it produces a perceived variation in the level of prosperity (Buchanan and Stubblebine, 1962). Without that perception, only acts of coercion can induce the subjects to respect the eventual limits imposed. As has been shown many times, the economic perception and the sharing of the workload between the subjects involved constitutes the base of the success of the development of the territory, and also makes it easier to respect the loading limits. In this sense it is reasonable to suppose that when the socioeconomic type of limit is reached before the physical one, a differential is created that carries out the function of “security margin” in the use of the natural resources of the area. Interventions aimed at reducing the limit of socioeconomic loading, and therefore increasing the differential between this limit and the physical limit, are potentially capable of producing positive effects in the conservation of the ecosystem.

We have seen that the loading capacity, studied in its three individual components, presents limits of a physical, socioeconomic and economic nature, each of which, if exceeded, lead to environmental consequences which are different both in their nature and in their intensity. Considering that these consequences form the principle factor that determines the type of intervention necessary for restoring the territory to how it was before the limits were exceeded, it seems appropriate to focus on the limit defined by the capacity of the ecosystem. The problems that derive from the surpassing of the socioeconomic and economic limits can be resolved with actions of a short term or medium term duration, they differ from environmental problems that, even if not irreversible, always require long term, or extremely long term interventions to restore the territory to its original state. This implies that the following consideration assumes particular relevance in the quantitative determination of the loading capacity: *when the loading capacity is expressed in terms of the results of the capacity of the ecosystem, the socioeconomic capacity and the economic capacity, the maximum limit of exploitation is represented by the physical limit defined by the ecosystem of the territory.*

The diagram of the use of the territory shows four zones characterised by specific levels of overall acceptance:

- *Zone A* contains levels of use that totally satisfy the loading limits. The requirements of conservation of the resources are fully satisfied, but the economic productivity of the locality can be seriously compromised.
- *Zone B* contains levels of use that exceed the socioeconomic and economic limits, but stay within the physical limit
- *Zone B1* is between the socioeconomic and economic limits. This zone allows room for growth in economic terms, but the surpassing of the socioeconomic limit can create social tensions between residents and tourists. Defining the socioeconomic limit as the level over which the benefits of tourism are neutralised by problems of a social nature, this implies that even after surpassing this limit the economic results continue to show a positive growth. It is therefore reasonable to assume that the economic limit is positioned at a higher level than the socioeconomic limit.
- *Zone C* contains levels of use that totally exceed the loading limits. This is known as the “red zone”, in which the levels of exploitation of the resources are so devastating that if prolonged over time, cause the total loss of the “qualities” of the territory.



As shown previously, the determination of the loading capacity of an area requires the analysis of the following aspects:

- The physical characteristics of the area
- The attitudes of the local community
- The attitudes of the tourists

In reality, the juxtaposition of residents and tourists can generate strong feelings of conflict regarding the use of the resources, the intensity of which is of an inverse proportion to the availability of the resources and directed at the differences between the two groups.

The problem becomes more complex if one considers that the local community and the tourists are comprised of subcategories capable of evolving profoundly over time. It is often necessary for subjects belonging to a determined subcategory to modify their own standards and/or behaviours to minimise the negative effects produced by the relationship between the locals and tourists (Graefe and Vaske, 1987) – (Manning and Power, 1984).

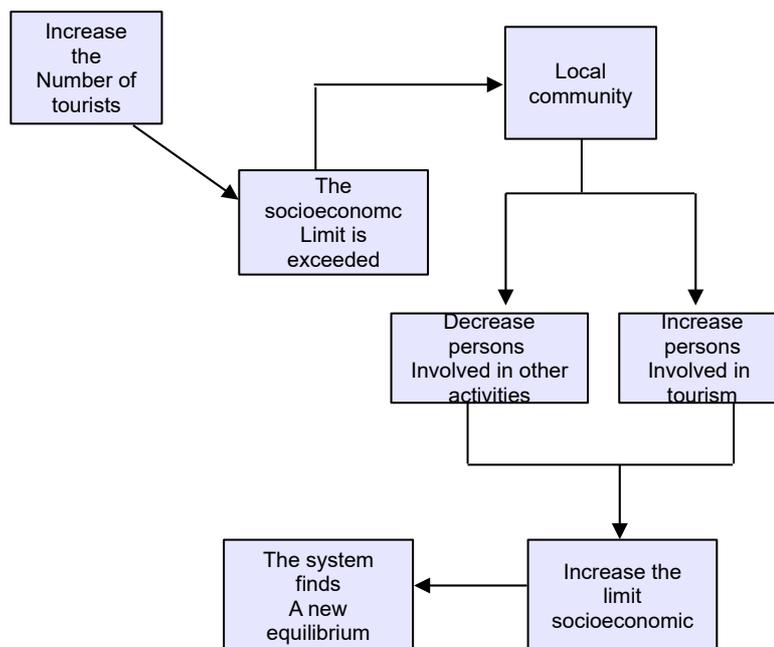
In the following paragraph it will be explained how the dynamic that characterises the process influences in a determining way the definition of the state of equilibrium.

#### *Optimum level of use*

The concept of loading capacity applied to the tourism sector is characterised by the combined presence of objective and subjective elements that influence every part of the dynamic of the process. This creates difficulties in determining and accepting a single procedure for finding a balance that promotes the sustainability of the territory. However, in the following pages some arguments based on different ways of approaching the topic will be discussed. In every case, the problem consists of identifying the correct balance that will reconcile the needs and expectations of the tourists with those of the local community, without compromising the quality of the physical resources on which these two categories found their contrasting interests. Conflicting interests, projects which are not shared and opposing attitudes are the cause of conflicts which are more or less intense between the resident community and the tourists, they constitute one of the elements that define the quantitative difference between the economic and the social limit. The loading capacity requires therefore the determination of the right compromise of acceptability and effectiveness in the prospect of avoiding and/or knowing how to manage eventual social conflicts.

*Number of presences and physical, social and economic loading capacity*

It has already been shown that the determination of the loading capacity requires the inclusive management of aspects of a social, economic and physical nature, each of which is characterised by their own loading limits which can be put in order of size starting from the socioeconomic limit. The concept of a socioeconomic limit understood as the level of presences over which the benefits of tourism are cancelled out by the consequent impoverishment of the quality of life, probably represents an element of disagreement within the local community between those involved and those not involved in the tourist business. Contrasting situations are not only possible between people involved in tourism and people outside the industry, but can also arise within the same resident category if it includes people with differing interests and personal sensibilities towards the tourist phenomenon. A possible example of this could be the different levels of tolerance and acceptance towards the tourists that a small hotel owner would have with respect to those of individuals involved in other local activities. The internal composition of the resident categories is therefore capable of influencing the limit of socioeconomic loading, which will tend to increase as the number of residents involved in local tourism grows.



In the presence of a growing share of the economic benefits of tourism within a local community, a new level of socioeconomic balance will be reached.

It is therefore plausible that the system, because of the effect of this “auto alignment” dynamic, is able to sustain a loading level moderately higher than the limit of socioeconomic loading, without necessarily giving rising to and/or continuing situations of social conflict. The disappearance or absence of these eventual “critical” situations constitute the main indicator of the reaching of a new level of equilibrium. The correct management of the relationships between the people involved means that zone B1 is characterised by a level of risk in the acceptable range, more so than a corresponding level would be in the other zones when considered within a medium term horizon. The short analysis that follows demonstrates that the zones A, B and C create the conditions to activate dynamics in the system in net contrast with sustainable tourism.

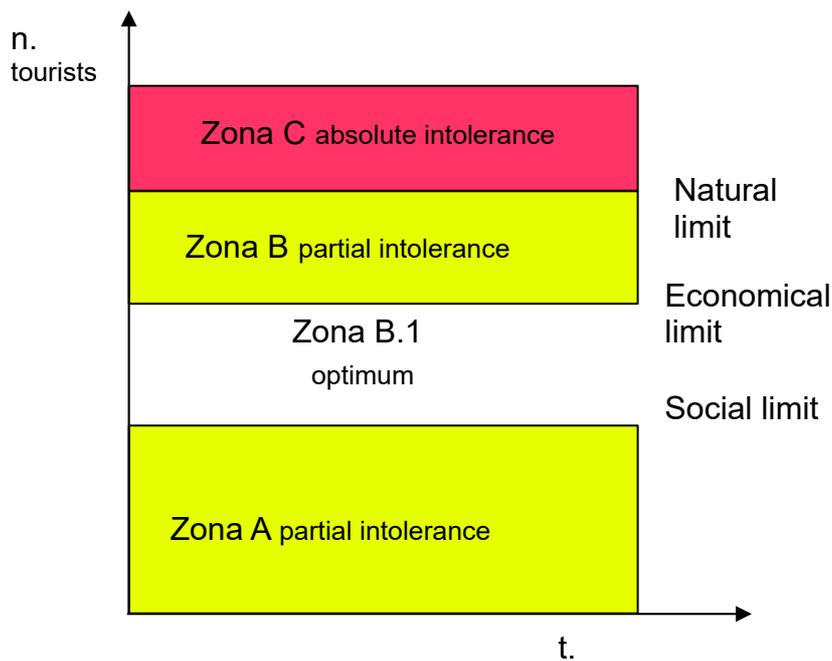
**Zone A** (relative intolerance) contains levels of presences that guarantee the conservation of the local resources, but the local operators do not derive enough economic benefits from tourism in order to start up or continue enterprises. The development of the territory registers therefore rates of growth which are too limiting and the locality is abandoned by its subjects along with any likely possibility of success. It has been shown many times that the development of the local economy, and with it the growth in global terms of the resident community, constitutes a formidable entrance barrier towards a multinational society. A locality with potential as a tourist destination, that registers a number of visitors that is constantly too limited to guarantee the start up and development of a strong organisation of local operators that base their company strategies on the area, becomes easy prey for mass tourism. Values of presences of tourists included in zone A therefore risk obstructing the birth of local economic opportunities that offer the local community a healthy chance of development, they constitute the main defence of the area from external influences.

**Zone B** (relative intolerance) as shown in the graph, represents loading levels between the economic limit and the physical limit: two of the three limits

considered are exceeded, the system can sustain these values only for fairly limited periods. The main risk is of a “lever” effect capable of quickly raising the number of tourist presences over the physical loading limit. Loading values that prevail above the economic limit naturally bring about the loss of the best clientele, who move towards less crowded destinations, and at this point the local operators, in the attempt to maintain the same level of returns, react with strategies based on price. The quality of the clientele transforms, descending from a high unit added value to a low value, this generates a reaction on the part of the operators that causes a strong increase in the numbers of tourists present. The destination quickly loses its competitiveness with other emerging destinations, and new short term strategies based on the quantity rather than quality of tourists become the simplest way of conserving the health of the local economy.

*Zone C* (absolute intolerance) presents loading levels which are too high and cause the local resources to sustain irreversible damage. Deprived of its attractions the locality transforms into a simple physical container with big receiving complexes which are totally autonomous and not connected to the territory: this is the diffuse application of the “all-inclusive” formula. The phenomenon is frequent in the mature tourist localities, that often need to increase the level of use of structures realised on the basis of insensitive programmes of building development, totally foreign to a logical progression of territorial development.

*In zone BI* the loading levels exceed the socioeconomic limits, but satisfy the economic limits. The total returns, considering the level of crowding, tend towards their maximum values. It has been noted that during the phases of realignment to the new conditions of equilibrium (from which the subjects involved will be able to obtain the maximum benefits from tourism) it is likely that tensions will increase between the local community and the tourists. It is the duty of the territorial planning to promote research into finding these equilibriums, reducing in this way the length of the intermediate phases.



Based on what has been described so far, it is therefore reasonable that:

*The optimal level of use is an interval structurally inserted within zone B1, but which can be exceeded in a managed way during some limited periods.*

This is especially true in the case of important events or local manifestations that, as has been stated in the preceding chapters, often constitute an irreplaceable element of tourist attraction, the hypothesis that the territory can and must support a higher level of loading than the so-called optimal level of presences is sustainable.

However, these situations, because of the heavy possible implications that they can have on the territory, must be:

- *planned*, be a part of the territorial plan for medium-term development in accordance with the various local parties
- *shared*, all the local community participates in the resulting economic products
- *extraordinary*, they only ever occur for a limited time period
- *managed and monitored*, the effects on the territory are constantly analysed, in a way to counteract eventual situations of natural and/or social stress.

With regard to the determination of the optimal level of loading the following considerations are raised:

- *the optimal level is expressed preferably through an interval of values rather than a unit value*
- *this interval is strategically positioned between the socioeconomic and the economic limits*
- *the width of the interval depends on the dynamics of the process of evolution that respects the subjects involved both at the moment of joining up, and during the respective contractual efforts in the definition of the territorial planning*
- *the maximum value of the interval depends on the capacity of “realignment” to the new values, of the limit of socioeconomic loading*
- *any exceeding of the optimal level must be carried within a controlled environment of specified conditions*

#### *Optimal levels of usage*

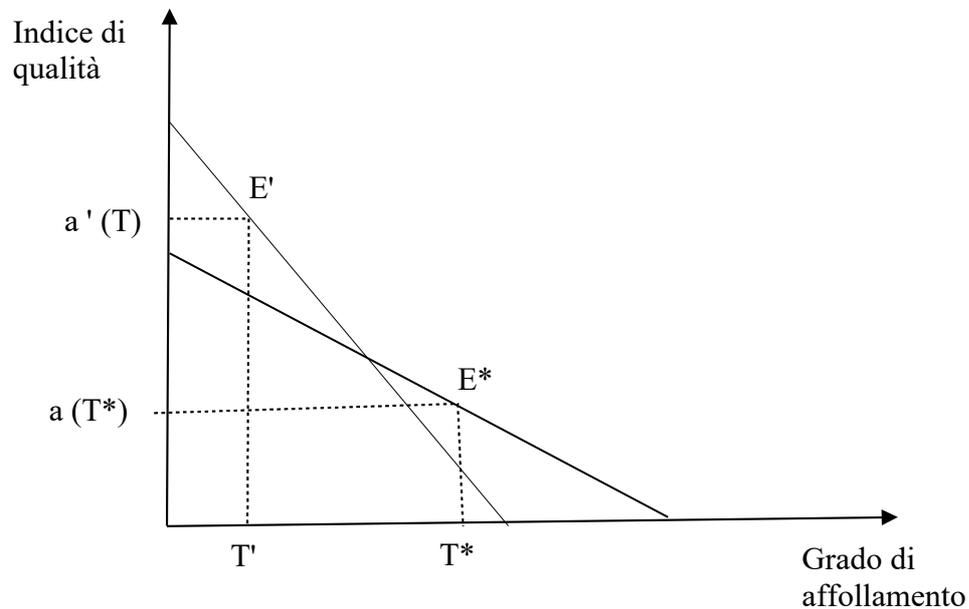
Assuming that the well-being of a local community depends not only on the quality of the environment (social aspect) but also on the proceeds of the use of the natural resources by tourism (economic aspect), to calculate the optimal level of use means to find:

*the maximum level of crowding (number of tourists) that allows the maximisation of proceeds from tourism in the presence of an aversion to crowding*

The inverse relation between the level of crowding and the quality that the client associates with the locality translates to the price that the client is willing to pay, and guarantees the existence of a single level of optimal usage. This, translated into purely economic terms, allows us to affirm the following:

*It is worthwhile to use the resource until the reduction of the expenditure per head of the tourists, due to their aversion of crowding, is no longer compensated by the increase in the number of tourists.*

From the analysis of this principle, we consider that the trends of the variables involved are represented by means of linear functions, hence the following diagram is obtained:



Where:

- **T** represents the level of crowding. In practise this can be thought of as the relationship between the number of people present and the surface area of the locality
- **a(T)** represents the quality index of the locality

For simplicity it is assumed as an inverse function of the level of crowding:

$$a(T) = A - bT$$

Rearranging the equation, the optimal level of usage is given by the relationship:

$$T^* = A/2b$$

To assume that the optimal degree of usage is so much lower than the level at which the tourists become sensitive to the problem of quality, means considering the graph  $a'(T)$ , which according to the relationship indicated above, corresponds to the optimal level of crowding,  $T'$ .

The procedure examined has a purely theoretical value in as much as it is based on linear relationships, when in reality the trends of the variables involved follow

functional rules which are much more complex, among which are most relevant conditions in which the stay is exercised. Independently of this, according to the times reported, to reassess the loading capacity concerning from within just the economic structure, brings only much partial results which cannot be capable of accurately representing the problems under examination. It's now accepted that loading capacity, from which the optimal level of usage is obtained, must be in fact considered on a basis of other points of view of which two assume a principle role: *physical and social*.

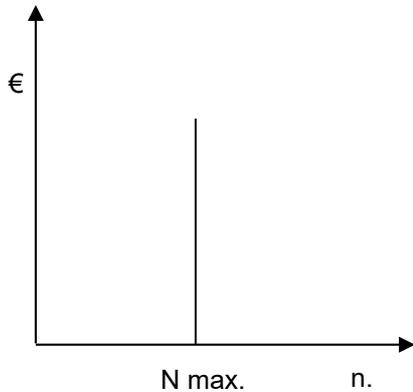
The analysis concludes with the implications that derive from the following points:

- When referring to the preferences of the tourists, it appears reasonable to believe that in spite of preferences being very heterogeneous even within the area of environmental tourism (Butler 1991), an ever more relevant number of tourists associate the increase in crowding of the natural resource with the reduction in qualitative terms of the tourist locality
- The demographic trend of the European population shows the significant growth of the two older age categories of tourist: 45 – 64 and over 65. It is however plausible that this will produce an increase in income from tourist activity and a movement of chosen tourist destinations towards better conserved localities and therefore of a higher level of quality.
- It has earlier been stated that the preferences of tourists change over time due to various factors including age, income, level of education, increase of free time etc. With the increase in the average level of education of the population it is reasonable to imagine that the tourists will pay more attention to the value of the natural capital, which in this way will become one of the principle determining factors in the choice of destination.

#### *Number of presences, net total benefits and public costs*

In general the willingness to pay a high price on the part of the tourist depends on their enjoyment of the product and this is connected to the level of crowding that characterises the place considered.

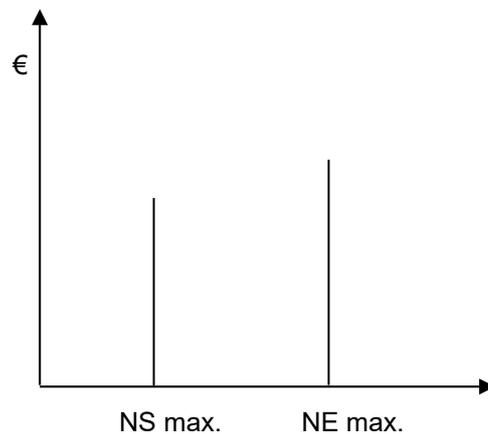
The situation is represented by the curve that expresses the total benefit as a function of the number of presences:



$N_{\max}$  is the number of presences that maximises the total benefit without considering the whole of the costs necessary to organise a tourist enterprise:

- costs of direct production
- public costs (for example costs of a social nature that the collective public must bear)

If one considers, now, the curve of the net total benefit, obtained by subtracting from the total benefit the costs of direct production and the public expenses, the following graph is obtained:



$NS_{\max}$  is the point in which the marginal net benefits are equal to the marginal public expenses, it represents the socially efficient level of use of the tourist resources, and  $NE_{\max}$  represents the best level of use for the local tour operators.

Based on what has been stated, it is therefore reasonable that:

*The optimal level of use is a point of equilibrium between social and economic aspects included within  $NS_{max}$  and  $NE_{max}$ , determined as a function of the contracted efforts of the involved parties.*

### ***The loading capacity: an economic restriction?***

From the preceding pages it emerges clearly how tourism is one of the sectors that in a greater measure than others uses the natural materials as primary resources of its productive cycle, and that these assume an ever-more important role within the motivations that induce the tourist to choose a specific locality. The usage of an area for tourist purposes necessarily brings physical consumption, caused directly by the tourists whom the additional infrastructures are built for and of support to the natural attractions. Tourism presents within its intrinsic characteristics the tendency to modify the environment, therefore if this invasive capacity is not contained within certain limits, it can bring negative and irreversible consequences to both the environment and to the connected economic activities.

In anticipation of what will be covered in the following paragraph it can be stated that:

*These limits depend on the capacity of the territory to absorb the “stimuli of tourism” and place them in equilibrium with the local resources.*

### ***The physical resources***

The physical resources can generally be classified according to:

- The supply
  - exhaustible
  - inexhaustible
- The possibility of reintegration
  - reproducible
  - non reproducible

When speaking of the use by tourism of the resources, four possible combinations present themselves:

- Non reproducible and inexhaustible resources – the use of these does not modify their future availability, but the exploitation above certain limits compromises their properties
- Non reproducible and exhaustible resources – the use of these partially destroys them, therefore they are consumed over time
- Reproducible and exhaustible resources – these are subject to consumption by exploitation, but they are capable of regenerating. Hence it is necessary to determine the level of use compatible with their regenerative capacity
- Reproducible and inexhaustible resources – these are not consumed when used and grow at a natural rate. If the presence of tourists does not grow at the same rate, they will become progressively less utilised.

To quantify and apply a determined loading capacity means, in fact, to fix quotas for the current use of the natural resources and to conserve them for the future. It therefore seems that sustainable management of the resources imposes a sacrifice on the part of the current generation for the benefit of future generations, in spite of the large amount of uncertainty that characterises the changes of the preferences of tourists. Probably in free market conditions, where short term logic is applicable, the tourist loading capacity will be seen as an unsustainable sacrifice of the prospective income. The containment of the numbers determines, in fact, the shrinking of returns and of the profit, compensated only with an increase of the unit price of the product, which can at times be difficult to apply. In addition to this, it can often be shown that in reality private interests diverge from collective interests: even if everyone collectively upholds the advantages of policies of environmental conservation, it is not economically viable for any one individual to put them into practice. Sustainability however is not the objective of a strategy that limits itself to the ambit of small local businesses, it cannot be the symbol of an individual operator, but must be the connecting thread of a projected vision shared on a local level, of which the principle characters are found in the public organisation. This holds true for every form of sustainability, but is most relevant for a sector such as tourism, characterised by the presence of numerous small local enterprises, that generally perceive the quality index as

including the conservation of the resource, dependent only to a limited extent, or not at all, on their decision making process. Shortsightedness and/or a high rate of discount on future yields on the part of the tour operators seriously intent on investing their energies into the development of the locality, in these circumstances can encourage the application of strategies with high levels of use of the natural resources. The more rational use of the resources however, does not necessarily damage the economic interests of the current generation when it forms the central part of the planning process, management of the territory and of tourist activity. The consequent advantages of the observation of these loading limits will not register on distant horizons. In any case, the rules and principles of sustainability must be considered in the perspective of reaching the optimal level of usage of the resources, quantifiable through mechanisms that allow the assessment and comparison between the costs and benefits of the action taken, but always with a view to guarantee acceptable results for the local operators, in terms of economic profit.

#### *The future equals the present*

In the economic field, almost any forecast process bases its future projections on past trends: the ability to produce future returns, the start-up formula of the business, the bringing up to date of future values obtained by inputting the past returns, or the varying budgets of the sector, on which the programming and the company planning are defined, are all calculated based on past experiences, and are only some examples. The tourist sector naturally behaves in the same way, but is different from the other economic sectors in that it is influenced by a greater number of variables containing extreme variegations that determine dynamics not always easily interpreted. In the tourist locality hypothesized by Butler in 1980, "Lifecycle of the tourist product" the tour operators at times delude themselves that the future forecast is the projection of past results, perhaps characterised by a strong growth in the numbers of tourists and of profits, but then wake up to a reality in which the numbers of tourists present are shrinking and with them the returns, because in the meantime the tourist proposal has lost most of its capacity to attract tourists. This also happens to other

'products' but in tourism the duration of the success of a locality also depends on other factors that if definitively lost cannot be regained and the consequences are noticed immediately, not in the future. It is therefore rash to consider that the future, in terms of sustainability, is distant.

In usual company procedure time thresholds can normally be categorised in this way:

- Short term – up to 12 months
- Medium term – up to 3 to 5 years
- Long term – more than 3 to 5 years

Therefore the question is this: Into which category should the concept of the future with regard to sustainable tourism be inserted?

The response is simple and can always be found in the definition of sustainability when referring to future generations, which certainly refers to a period greater than 5 years. So it seems that the problem if there is one will regard only future generations, allowing the present generation the freedom to decide to limit the current exploitation of the resource to the benefit of future generations, or to 'eat it all at once' because as Lorenzo de Medici said, "Who would rather be happy tomorrow if it is not certain?" Against this hypothesis, however, the signals from the real situation are clear enough in that they show exceeding the limits of sustainable use of the natural resources does not just endanger the economic prospects of future generations, but also produces loss of returns for the current generation, the time taken for effects on the competitiveness and attractiveness of the place to appear is much shorter than the average length of time normally attributed to a generation.

#### *Visibility and public administration*

In the preceding paragraphs when the existing relationship between the administrative body of a capital-based enterprise and its shareholders was discussed, it was underlined that the continuing employment of the administrators will depend above all on the yields that the company has produced in the three years of their contract. Longer term strategies, without some guarantee on the part of the current administrators to enable their contract to be renewed, risk therefore becoming advantages only for the administrators

that will substitute the current body, deductions from the shareholders meeting, and being unable to reach the prearranged objectives.

Analogous situations can be seen in public administration. It is made up of two large, very different categories

- *That of elected politicians* - they are elected through popular choice. They assume an office which will expire and is renewable. They have the task of defining the programming and the planning of the administration and of translating it into concrete action
- *Their dependents* – these are taken on through a competitive interview process. They assume an office for a determinate or indeterminate length of time. They have the task of assisting the political body in the management of the administration and realisation of the local planning

While the confirmation of the contract for those in the dependents category is not directly linked to concrete results of the action on the territory, for that of the elected politicians, the visible results obtained during their term in office often determine their future re-election.

Long term programmes in which tourist sustainability clashes with the need of everyone, whether they are politicians or managers, to obtain results which are:

- *Quantifiable* – those that can be measured in terms of benefits produced
- *Spendable* – those which can be used for personal ends
- *Visible* – those which are easily recognised by the community
- *Short term* – those which start to produce the benefits promised within the duration of the term of election

There is a way of thinking diffused throughout many local administrations according to which, “nobody can see cleaner air, while a school, a road or a bridge are obvious to everyone”.

In this context sustainability risks remaining solely one of many good intentions that are included in many plans of local tourist development.

To demonstrate to the parties involved at all levels that sustainability is a current necessity and not only an investment for the future, represents one of the essential conditions for ensuring it is achieved.

## **Conclusions**

At the beginning there was alternative tourism, a sort of transgression of the pre-packaged holidays of modern civilisation, a desire to break away from the dominant stereotypes. With the introduction of sustainability was added the economic feature that transformed this idea of tourism into the winning strategy of development for many zones at the margins of the usual tourist routes and the guarantee, also in economic terms, for future generations. As a consequence, within the planning for tourism, the loading capacity has assumed a fundamental role for the safeguarding of the interests of all involved parties, representing the boundary that if exceeded risks permanently compromising the quality of the existing resources (if they are non reproducible). Another presupposition for lasting development of the territory is that of directing investment towards the resources whose restrictions of loading capacity are the tightest (if reproducible) in this way guaranteeing and improving the accommodating ability of the destination for the future and also in the present. It emerges that in fact, it is quite probable that the negative effect produced by the eventual deterioration of the environment will not just be a problem for future generations, but also those of the present.

## **THIRD PART**

### **Chapter 7**

#### **Sustainability and development conditions**

Tourism is considered as a “basic social fact” and is one of the most dynamic and innovative economic sectors, as has already been revealed previously, each of its elements relates to areas and factors which are subject to processes which are extremely unstable and often difficult to foresee. The World Tourism Organisation estimates that within ten years there will be more than 1.6 billion tourists in the world, and that one in five workers will be employed in activities related to tourism. The publication of the EU General Directive of Business, “Sustainable tourism based on natural and cultural heritage” identifies five factors at the base of this process:

- The introduction of the Euro
- The liberation of transport sectors (in particular air travel)
- The wide integration and facilitation of travel in Europe
- The development of new technologies that simplify planning holidays and allow other tourist markets to be reached
- The joining to the EU of central and eastern European countries that will open new markets. It is considered in fact that the growth of arrivals will be larger in central and eastern rather than in western Europe

Therefore a new Europe is being born not only physically through the widening of the European Community, but also by means of new forces that are deeply modifying our continent, our way of life and work and the limits of our spatial horizons. This also implies that in the field of tourism the small and medium enterprises, that as we have seen represent the load bearing axle of the whole system, will find themselves included in markets that are constantly becoming more dynamic and uncertain, and will be carriers of new strategic and operational challenges that will require management to become more professional. If it is true, as it seems, that the tourism of the future will represent the principle economic sector worldwide, every effort at every level must be

made to reach and guarantee sustainability which is the only true way to ensure that the benefits that will be brought by tourism are distributed at local level in a fair manner and not by employers and their dependents. Speaking of sustainability solely as the way to guarantee the interests of future generations risks forgetting the fundamentally important function that is carried out in the homogenous development of the territory in allowing the involvement of the local community in the tourist activities.

*In this way sustainability becomes a tool of social solidarity that draws the different territorial areas nearer to each other and to a superior standard of living.*

It has been pointed out many times that one of the principle consequences of mass tourism on the territory is the differential that exists between the positive and negative consequences that with the passing of time tend to reduce themselves, even arriving at a change of sign, increasing the various problems while the profits diminish. At the base of the process that brings sustainability is the attempt, not to say the need, of defining those current balances which will be carriers of immediate sacrifices, but that will allow the benefits to be enjoyed, including economic benefits, for an unlimited period of time. The interventions of the parties involved, that because of their institutional role or out of necessity must share the fates of the places in which they operate, result in decisive actions that cause this attitude to be shared within the regime of the free market, and cause the strategies of the short term temporal profiles to leave space for a wider range of action at a later stage. To translate all this into one slogan: a sacrifice today for a better future. By its nature any one moment in time is the result of the evolution of one or more preceding phases, according to a dynamic that follows a constant and uninterrupted flow. In the field of business economics examples are used of fluctuations of values that have led up to the financial situation at any given moment. To affirm however that the future is the result of processes that start in the present, means to accept that without the present the future might not exist.

This observation appears to be intuitive, but when referring to sustainable tourism it almost assumes the status of a warning:

*To safeguard the interests of future generations, it is necessary to first safeguard those of the current generation, in order to avoid that the extinction of the current subjects creates a sort of “gap” in the dynamic of the process, with the consequent loss of the “dowry” made up of the knowledge, values, sentiments etc. that is transferred from father to son.*

This argument will be discussed in the following paragraph.

Organised tourism in harmony with the principles of sustainability seems to be the only form that guarantees a continuing enjoyment of the benefits into the future that this important sector brings and will bring into the lives of many individuals. It has also been shown that sustainable tourism is not a specific form of tourism, but a different way of implementing that which is still today dominant in market terms, by which is intended the tourist activity and the planning aimed towards wider ranging temporary horizons and towards a greater consideration of those values that are not directly quantifiable in an immediate monetary sense. Sustainable tourism therefore is not an exclusive prerogative of any form of tourism, all can apply it, but outside of a purely theoretical context where grand declarations are easily made, it is without doubt that sustainability and maximisation of economic profit are two concepts that have few points in common within the short term horizon. When good intentions turn into concrete facts, the rules of the free market favour the application of short term company strategies, heedless of the eventual problems that the territory will have to face in the future, and this is without factoring in the uncertainty that is a part of the dynamic of the modern tourist market.

### ***Profit and numbers of tourists***

Starting from the lifecycle of the tourist product of Butler (1980), supposing that the profit is in direct relation to the number of tourists present, considering the dynamic of the effect of the costs of investment on the profits, it is possible to hypothesise the following graphical representation of how profit varies as a function of the number of tourists. (part to be made)

The graphical representation was constructed on the basis of the following considerations:

- *In the explorative phase* the number of tourists grows slowly, remaining at extremely contained values, almost negligible. The profit starts from a negative value, independent of the number of tourists, caused by the financial burden of the initial investment. With the growth of the number of tourists, the profit shows a decreasing trend until it is in balance with the company start-up, after this it starts to increase, although staying negative.
- *In the involvement phase* an increase in the number of tourists can be observed. The effectiveness of the operation starts to be observed. The returns start to increase, bringing the economic result steadily towards the break even point.
- *In the development phase* the number of tourists present increases at the maximum rate possible. The phase starts in which the return on the investment becomes more fully realised. The added value of the company, understood as the difference between the costs and the direct returns from the product, starts to reach its maximum value.
- *In the consolidation phase* the number of tourists grows, but at a slower rate than before. The resultant economic burden of the initial investment is progressively reduced, therefore the profit in quantitative terms still tends to increase.
- *In the stagnation phase* the number of tourists starts to decline, but the financial burdens are by now almost negligible and the initial investment is completely paid off. In spite of the fall in numbers, the profit remains constant.
- *In the declining phase* the number of tourists starts to fall more rapidly. This can be caused by various reasons, one of which is the loss of the ability to attract tourists following the manifestation of the negative consequences on the territory caused by exceeding the loading capacity described in the preceding chapters. The operation of the complex is no longer capable of giving the same performance in terms of profit, so that without new interventions it starts to diminish steadily.

The exceeding of the loading capacity has caused the irreversible deterioration of the resource and the consequent decline of the area, but in the preceding phases of the lifecycle it is probable that the formation and the dynamic of profit contributed decisively to the excessive use of the resource. Above all in presence of high investment of private capital, in the absence of imposed restrictions, the strategy which is most reasonable to apply is that of reaching the highest profit in the shortest period of time possible. According to the principles that regulate business, when considering a large tour operator, the work of the management will surely be evaluated on a basis of the economic results obtained and of the ability demonstrated to enhance the investments effected in terms of expected yield. The conservation of the natural and cultural heritage of the region will assume a role of secondary importance in the eyes of the foreign investors with respect to the economic finalities. Only the most farsighted people involved, and those who are animated by less materialistic ideals will be willing to move away from this vision which is so diffuse in the entrepreneurial world. When the company decisions are then made by investors exclusively on assumptions that are merely speculative, outside of a strategy of medium to long term development, the situation becomes even more difficult. With a philosophy of “use it and throw it away” which is being applied in more and more areas, speculative strategies are frequently adopted which are based on the exploitation of local resources with the aim of maximising profits, then the locality is abandoned when the profits no longer reach the values expected. A good example of this can be observed in the industrial sector. The rationale of profit has brought about the delocalisation of companies, they base their production plants in developing countries that have large quantities of low cost unskilled labour and do not have the regulations that safeguard the environment and the workers. When the development of the country is followed by the increase of the remuneration of the manual labour and the application of the most elementary rules of social and environmental safeguarding, the production plants are dismantled and production is transferred to other countries with similar characteristics to those that the now “developed” country initially presented. At the end of all this are old abandoned factories, hundreds of unemployed people,

and a territory that is irretrievably compromised. In the tourist setting similar situations can often be found in the coastal areas of Tunisia. Here, the foreign capital-based companies that manage the seaside resorts prefer to build new tourist structures when the old ones become in need of refurbishment, rather than rebuild the old, for mere economic reasons. This turns the coastline into a succession of brand new hotels followed by totally abandoned, dilapidated constructions, that portray rather melancholy scenarios.

Returning to the possible strategies of the tourist industry and on the impacts that these have on the host areas, in the absence of restrictions and/or limitations imposed by the institutions of the country, it is easy to imagine two possible alternatives:

- *To maximise the exploitation of the local resources* with the aim of maximising the medium term profits. Then to abandon the locality in the moment in which the degradation of the local resources reduces the economic performance of the business below the prearranged limits
- *To apply a sustainable deployment of the local resources*, with the objective of guaranteeing the conservation of the natural heritage of the region and the well-being of the local community, even if this brings an obvious reduction of income for the business in the medium term.

Owing to what has been previously set out it is reasonable to suppose that when the choice is the exclusive jurisdiction of the business, the vast majority of cases will direct the strategy towards the first hypothesis, maybe using the “label” of sustainability, which is currently very fashionable, as a mere tool of marketing.

It is however possible to formulate a “first consideration” regarding the effective conditions of sustainable development:

*Tourist sustainability manifests itself through its implications on the local environment. It is in fact observed that its courses of action are directed towards the conservation of the natural, cultural and social heritage of the area, with the aim of preserving for future generations the same economic opportunities that the current generation enjoy. Within the subjects – private sector economic operators involved in the processes of developing the territory, the role of the protagonists in the pursuit and application of tourist sustainability cannot be*

*assumed by anyone but the micro, small and medium sized businesses of the area, as they are the only ones effectively integrated into the destiny of the area.*

Regarding the two preceding hypotheses of company strategy, it is without doubt that for the small operators deeply rooted in the territory, those that operate a business regime and those that are non-profit, the only practical way to guarantee the quality and the conservation of their investment over time, not just economic in economic terms, is that of tourist sustainability.

### **Sustainability as a guarantee for the future**

In the preceding paragraph it was affirmed that by its nature a temporal phase is the result of evolution of the phases that have preceded it, according to a dynamic which represents a constant and uninterrupted movement. This determines that the future will depend also on the current choices regarding the conservation of values and heritage that will be available to future generations. With regard to the effective conditions for sustainable development, it has been affirmed that the principle and natural protagonists of the territorial conservation are the small local operators, which means that the future of the local community, not just in terms of financial health, will depend on the importance attached and the role carried out in managing tourism of the small and medium local enterprises and by the non-profit organisations. Regarding this, two phases of tourism need to be separated from each other:

- *The initial phase* – that consists of the definition of the contents of the planning and programming of the development of the territory. It can consist of the drawing up of the first stage of the plans for the development of the area.
- *The successive phase* – through which is realised the planned initiatives in the programme of management of the territory

The “second consideration” regarding the effective conditions of sustainable development, seems therefore an obvious consequence of the first:

*Because of the fact that tourist sustainability is carried out through the small and medium local operators, it is necessary to:*

- *Carry out those interventions to guarantee the survival and the present and future development of those subjects, that operate in a business regime and in non-profit agencies.*
- *Carry out interventions aimed at increasing the involvement of these economic subjects in the management and in the choices of the general use of the resources present in the area.*

The “*first consideration*” identifies the subjects towards which the efforts will be aimed to attain sustainability, while the “*second consideration*” identifies those measures and/or interventions put into practice to guarantee the conditions of existence, survival and development of those subjects and their involvement with the politics of the area.

As will be shown in the following chapters, these interventions are classifiable into two general areas:

- Public Institutions, which are divided into:

Local politics

National and/or transnational politics

- Private enterprise, which can be divided into:

Company interventions

Interventions by category

### ***Sustainability as the brand “doc”***

*The danger is that of treating sustainability as a simple commercial tool rather than as a set of real and genuine management principles (Collins 1999), which would evoke more a happy picture than real objectives which are defined and realisable (Schmidt 1997).*

It is by now clear that an ever-growing number of tourists respect the need for sustainability. Although today this category represents a market quota which is extremely contained, the need to conserve the natural and cultural heritage is shared by the whole of modern society, including the large sector of tourists who choose traditional forms of tourism.

*Sustainability therefore represents an important marketing tool for an area, to raise public awareness of the necessity of the local communities and to involve these aims within the tourist requirements.*

Like every other tool, sustainability does not possess the intrinsic ability to choose who uses it, therefore there is a risk of this “brand” being utilised by the wrong people. The hypothesis of the existence of companies who declare themselves “sustainable” solely for publicity reasons without properly applying the rules that the philosophy imposes is not an unlikely one: sustainability becomes a publicity stunt, a trend, to sell themselves more effectively in the tourist market. In this case, the consequences for the local community and for the operators that effectively apply sustainability could be extremely negative:

- In a market in which everyone calls themselves “sustainable” the tourist is no longer capable of identifying the “real” from the “false” and in his uncertainty tends to lean towards forms of tourism with characteristics that are easier to understand, easy to check and probably “traditional”
- The “wrong” people could become involved in the planning and management of the territorial resources, whose real interests do not coincide, or are in contrast with, those of the area.

This is a problem that must not be neglected, and the only way to confront and resolve it is at an institutional level through the activation of specific control processes aimed at identifying and separating those initiatives that use sustainability only for commercial ends, from those that, instead, truly represent the spirit of the philosophy. *To realise this it is necessary to produce a sort of “certification” of true sustainability through:*

- *The identification of the minimum requirements to define oneself as sustainable*
- *The verification that these requirements are met*
- *The issue of the “doc” mark*
- *The periodic verification of the requirements*

In this way the conditions are created which direct the choices of the tourist in the correct way and allow administration to identify the organisations towards

which to aim eventual support and/or involvement in the political decisions of the area.

### **Conclusions**

By now it has been shown that the future of many localities depends on the choices that are made in the present by the subjects, both public and private, who with different degrees of intensity are involved in the development of the territory. It is this different degree of involvement in the future of the territory that must be considered to identify the subjects that constitute the true nerve centre of the present and future planning of the area. If these subjects, motivated by temporal horizons that are clearly long term, form the requirements of the well-being of the future generations, it is essential that at every level there is total agreement on the necessity to create those conditions, especially those operational, so that they can form, survive and develop.

To allow the “extinction” of the micro-small local tour operators, as a physical presence and as participating subjects of the planning for the area, risks creating a “gap” in the dynamic of sustainability, which will be difficult, if not impossible, to reconstruct in the future.

Sustainability is a concept that risks being used in an inappropriate way, creating in this way uncertainty both in the choices of the tourist and the choices of local administration. So it is necessary to have a type of “certificate” of sustainability in a form similar to “doc” products.

## Chapter 8

### **The technical management of small tour operators**

The Business Economy defines the company management as a system of economic operations, arranged in time in teleological or finalistic order and tending to directly follow the institutionalised company aims (Ardemani 1979). As for every object studied in a scientific way, even the management is considered in different aspects, each of which emphasises one or more essential characteristics, and neglects those remaining. The choice of the aspect which is considered by management, depends obviously on the effects that the management want to achieve.

Generally management can be subdivided into three principle courses of action:

- Technical management
- Economic management
- Financial management

Each of the courses of action mentioned is logically linked with the other two, so that the results that they produce constitute the complex reality of company life. The success of the company activity depends therefore on the good management uniting the three aspects.

#### *The technical management*

This consists of all the operators as a whole who determine the realisation of the product or tourist proposal. This is solidly related to the company phase that requires the greater professional and managerial capacity on the part of the operator, required to manage company system variables which are both internal and external. The technical problems caused by the production of the tourist proposal do not depend on the sphere of jurisdiction to which the local operator belongs, but are analogous both for the enterprise that pursues proportional profit, and for the subjects of the non-profit sector. A product capable of representing the expectations of the tourist that confirms his mental image of the locality through experience, is in fact linked to the profit only indirectly through the quantification of the costs and returns that on their own are not sufficient to

ascertain levels of satisfaction. In the chapter dedicated to the identity of the region, it was affirmed that when a place brings a sense of belonging to the people and/or things within it, it is reasonable to assume that it can become a successful tourist destination. The possession of this ability only represents one condition of development, there must be a collection of identifying determinants which are perceived by the local population as the integrated whole of the collective heritage of the place in which they live. In the absence of this perception/conviction the effect produced loses some of its intensity, the phases of growth slow and the locality quickly finds itself exposed to the competition. The management of tourism requires therefore the involvement and the sharing of the project on the part of the whole of the local community, whose contribution is present both in the projection phase and in the execution of the interventions.

#### *The case study of a small local tour operator*

A local operator is considered as an organisation which is run by a nuclear family and/or a few people belonging to the same area, typically a rural locality away from the “normal” tourist routes. The analysis is effected through the dated, but still valid, methodology SWOT. The acronym SWOT derives from the aspects utilised for the identification and study of the phenomenon under examination:

- Strengths
- Weaknesses
- Opportunities
- Threats

**S** and **W** represent the internal factors, taking into consideration the variables that are part of the integrated system of production and on which it is possible to act directly to pursue the desired objective.

**O** and **T** represent the external factors, the external variables of the system which are capable of conditioning it in both a positive and negative sense, opportunities or threats.

In reality, the analysis consists of the development of a whole of one series of considerations regarding the principle external and internal factors involved in

the creation and successive management of the tourist product. To increase the effectiveness of the analysis, each variable, first S and W, and then O and T, was connected to the context of which it was generated based on three factors:

- *The human factor* – the aspects/variables that depend on the people involved in the tourist activity. Generally this refers to the proprietor and collaborators, the additional service providers, and all the people physically present in the area, linked to the tourist activity
- *The capital factor* – the aspects/variables that depend on the funds involved in the tourist activity
- *The natural factor* – the aspects/variables that depend on the environmental and/or operating conditions within which the local operator finds himself inserted into and with which he has to relate to. These are situations that the operator is often subjected to and that he can only influence indirectly through, for example, lobbying institutions.

The variables can be identified through the solution of a collection of concise questions, as follows:

S: Strengths  
What are our strong points?  
Where do we consider ourselves most competitive?  
What are our key competences?  
How did our key competences develop?

W: Weaknesses  
What are our weak points?  
Where are we lacking in resources?  
What are the causes of our weaknesses?

T: Threats  
What negative trends can be foreseen?  
Which negative social and political trends can be profiled?  
Which trends are concurrent with ours?

O: Opportunities  
Are there new requirements on the part of the tourist market?  
What economic trends could they follow?  
What social and political trends could they follow?  
Are there new opportunities in other sectors?

SWOT analysis diagram applied to the phase of technical management of a  
hypothetical micro operator Tourist organisation of a rural zone

<b>S</b>	<b>W</b>
<p style="text-align: center;"><i>Low cost of primary materials (natural factor)</i></p> <p>The majority of the primary materials used in the production cycle are produced locally. The cost of these assets will therefore be related to the standard of living of the area, significantly lower than that of the major urban centres and of the local consortiums of the holiday villages</p>	<p style="text-align: center;"><i>Communication difficulties (human factor)</i></p> <p>It has been stated several times that one of the pillars of alternative/ sustainable tourism is the development of interpersonal relationships between the local community and the guests/tourists. Often however the relational exchange withers against the insuperable obstacle of linguistic differences, above all in cases of local communities composed principally of people of advanced age, where knowledge of foreign languages is not widespread. The communication process can therefore only take place on a national level, completely excluding international tourism, which probably would have brought greater profits to the local community.</p>
<p style="text-align: center;"><i>Availability of general foodstuffs which are natural and genuine (human factor) (natural factor)</i></p> <p>In rural zones many goods are produced directly by the operator, often using traditional farming methods.</p>	<p style="text-align: center;"><i>Narrow-mindedness towards guests (human factor)</i></p> <p>With regard to development of the interpersonal relations between guests and hosts, the ability to encourage socialising and concessions towards other cultures and other ways of relating is always needed by local operators. It often happens that the local community, because of the isolation that characterises it, does not have the capacity or the willingness to establish and manage effectively relationships with tourists. In extreme cases they are seen as an inconvenience, tolerated only because of the income they produce.</p>
<p style="text-align: center;"><i>Diffusion of customs and traditions of the cultural and religious type, rooted in the territory (natural factor)</i></p> <p>This diffusion is one of the principle and most widespread resources present in the rural areas. It is an important element in the reinforcement of the identifying characteristics of the region.</p>	<p style="text-align: center;"><i>Narrow-mindedness towards the tourist project (human factor)</i></p> <p>In the preceding chapters the necessity was highlighted of involving the whole of the local community in the tourist project, to offer a proposal of a high emotional value. The project however must be shared by everyone involved at a local level, both in the planning phase and in the execution. The difficulty of the local community in understanding and accepting their involvement in these activities is an expression of their dislike of these changes, which from the point of view of the tourist proposal represent the real reason for the holiday.</p>
<p style="text-align: center;"><i>Existence of events</i></p>	<p style="text-align: center;"><i>Absence of the necessary facilities (capital</i></p>

<p style="text-align: center;"><i>and country festivals (natural factor)</i></p> <p>In Chapter two the importance of local events to preserve and become acquainted with the culture of the area is emphasised. They represent one of the principle methods of enhancing the region.</p>	<p style="text-align: center;"><i>factor)</i></p> <p>Involving amateurs in activities centred on manual labour requires the use of tools and facilities capable of ensuring acceptable levels of safety, which are not likely to be present in the locality. Quality, in fact, also signifies guaranteeing the tourist a high level of safety, and this must constitute one of the priorities of whoever is involved in tourism.</p>
<p style="text-align: center;"><i>Presence of artisanal activities linked to the production that expresses the farming culture (natural factor)</i></p> <p>These can constitute an occasion for involving the tourist directly in formative activities and/or creating educational opportunities for schools, for example, working in ceramics, carpentry, or weaving.</p>	<p style="text-align: center;"><i>Tourist proposals that become “flat” (human factor)</i></p> <p>It is difficult to create an attractive proposal which is capable of maintaining the same level of intensity of involvement of the tourist for the entire duration of the holiday. A detachment can hence be observed between the expectations of the tourist and that which is effectively offered by the proposal. To attract a significant number of tourists and so rendering the tourist activity economically viable, it is necessary to have a critical mass of current and potential products available, which must be of the right composition to create the necessary competitive advantages.</p>
<p style="text-align: center;"><i>The widespread presence of sites of tourist interest of a historical and cultural nature, even if they often constitute smaller assets (natural factor)</i></p> <p>In every rural location in Europe there exist old buildings, churches and workshops that from a historical and cultural point of view have little to offer, but if they can “tell a story” they represent opportunities to arouse an emotional reaction in the tourist.</p>	<p style="text-align: center;"><i>Difficulty of guaranteeing adequate levels of hygiene (human factor) (capital factor)</i></p> <p>A good quality tourist proposal dedicates particular attention to the problem of hygiene at each stage of production. It is necessary to consider the physical structures of welcome of the tourist proposal (local means of transport, external space etc) as well as the methods used in the production and preparation of food and drink. From the results of questionnaires on the levels of satisfaction experienced by tourists it almost always emerges that “cleanliness and hygiene” are the aspects most criticised by the clientele.</p>
<p style="text-align: center;"><i>Integrity of the natural environment (natural factor)</i></p> <p>This is the resource around which all the development policies of the region are constructed.</p>	<p style="text-align: center;"><i>High costs of goods of foreign production (natural factor)</i></p> <p>When the use of technological items are required in the production process, even something simple such as a PC, they must be bought for the same prices which are paid in more developed countries. Considering the low standard of living, this translates to a significant increase of the total of the investment.</p>

<p style="text-align: center;"><i>Presence of a discrete number of museums, even if of small dimensions, spread throughout the area (natural factor)</i></p> <p>In many rural villages, in particular in Bulgaria, exist small museums that preserve objects of customary use, old photographs and documents which tell the story of the locality.</p>	<p style="text-align: center;"><i>Difficulty in offering sanitary assistance at an adequate level (natural factor)</i></p> <p>In spite of the fact that development of tourism determines an improvement of the local sanitary services, the structures in place are still only able to offer first aid. More complicated situations are instead managed only in the hospitals in the large urban areas which are often far away and/or linked by inadequate road networks. Considering that:</p> <ul style="list-style-type: none"> <li>• In the next few years the average age of the tourist is predicted to increase</li> <li>• The sanitary aspects assume a fundamental role in the sense of security that the tourist associates to a place</li> </ul> <p>It is reasonable to assume that the presence of an adequate sanitary system will play a fundamental role in the success of the locality as a tourist destination</p>
<p style="text-align: center;"><i>Relatively short distances between the various aspects that form part of the cultural heritage of the territory (natural factor)</i></p> <p>This allows:</p> <ul style="list-style-type: none"> <li>• The use of different means of transport for the transfer between one site and another, creating in this way differentiated proposals (car, bicycle etc)</li> <li>• The visiting of different sites each day, enriching the proposal</li> <li>• The combining of the visit with other types of offers</li> <li>• Greater ease of organisation of different transfers for the local operators</li> </ul>	<p style="text-align: center;"><i>Difficulties and high costs in reaching the location (natural factor)</i></p> <p>As it will be shown, the principle component of the cost of a tourist product is normally the transport. Above all in the absence of links with low-cost airlines, the proportion of the cost of transport can be as high as 40% of the total cost of the holiday. In addition to the cost it is necessary to consider also the complexity of the journey that often requires the use of alternate forms of transport. The majority of the rural localities are only reachable by car, therefore three hypotheses can be formulated:</p> <ul style="list-style-type: none"> <li>• The tourist arrives in their own car. This is more frequent in the case of itinerant tourism</li> <li>• The tourist arrives by plane in some part of the country and proceeds from that point in a rental car. The daily cost of hire is not justified if the tourist stays in just one locality.</li> <li>• The tourist arrives by plane and the operator organises the transfer to the destination. The individual operator must arrange the necessary vehicles.</li> </ul> <p>Whatever the chosen method is, it is reasonable to suppose that the time spent travelling has an effect on the number of days of the holiday remaining.</p>
<p style="text-align: center;"><i>Presence of local voluntary services</i></p>	<p style="text-align: center;"><i>Absence of managerial ability (human factor)</i></p>

<p style="text-align: center;"><i>(natural factor)</i></p> <p>The voluntary services are an irreplaceable part of the local heritage and represent one of the points on which to involve the whole of the community in the tourist project.</p>	<p>Organisational and relational abilities represent a determining factor for the success of business activities that require a continuing relationship with the public. The absence of these abilities, in addition to leading to unstable internal situations, represents a limit to the good management and development of collaborative relations with external subjects, not just in the tourist section.</p>
<p style="text-align: center;"><i>Raised awareness of local administration of enhancement of the natural heritage (natural factor)</i></p> <p>Local administration plays the main role in the safeguarding of the territory through area planning and the monitoring which follows.</p>	<p style="text-align: center;"><i>Disassociation of the local operators from the tour operators linked to the tourist market (human factor)</i></p> <p>The success of the tourist activities also depends on the synergy between the local businesses and foreign tour operators who are able to direct the market towards a specific destination. The isolated actions of the local community without the support and collaboration of the operators linked to the market are destined to produce poor results.</p>
<p style="text-align: center;"><i>Raised awareness of schools of the values of sustainability (natural factor)</i></p> <p>In the realisation of sustainability, the schools, including those in large urban centres, carry out an important role both as part of the requirements and of the tourist offer. The schools in fact can offer themselves as service users of the tourist proposals, as part of the local organisation through formative stages within the local community.</p>	<p style="text-align: center;"><i>Few tourist routes or themed, organised itineraries (natural factor)</i></p> <p>The presence of set organised routes above all within rural and isolated areas contributes to the sense of security perceived by the visitor. In business terms, it is synonymous with good quality and professional organisation.</p>
	<p style="text-align: center;"><i>Scarce or non-existent internet connection (natural factor)</i></p> <p>By now the use of low cost communications technology constitutes a fundamental aspect of daily life, both in private life and in a professional atmosphere. The presence of a fast, efficient internet link now represents a requirement of fundamental importance both for the operator and the tourist.</p>
	<p style="text-align: center;"><i>Difficulty in accommodating tourists who are disabled or who have even mild motor problems (human factor) (capital factor) (natural factor)</i></p>

	<p>The local structures, including the whole of the locality, cannot be equipped to host handicapped individuals, or even those with less serious motor problems. Considering the progressive increase of the average age of the tourist, this problem will be accentuated in the future.</p>
	<p><i>Seasonality (natural factor)</i></p> <p>Tourism in Europe tends to be a very seasonal activity, which causes working conditions to be non continuous and deficient, with consequent negative effects on the quality of the services offered.</p> <p>According to the National Federation of Rural Holidays, French agro-tourism employees work an average of fifteen weeks per year, which translates to an annual employment of less than 20%.</p> <p>Seasonal work, with working hours that can be prolonged and concentrated in a few small periods of the year impede the involvement of young people and/or those with higher level professional qualifications.</p>
<b>O</b>	<b>T</b>
<p><i>Innovation and improvement of the tourist product (human factor)</i></p> <p>The development of tourism generally encourages the acceleration of the evolution of local products</p>	<p><i>Influence of international legislation (natural factor)</i></p> <p>Although tourism operates in specific national contexts it is always more influenced by EU directives. Their application in a local setting assumes particular importance above all for requirements of foreign tourists, but this often brings extra costs for the operator.</p>
<p><i>Joint ventures with external tour operators (human factor)</i></p> <p>The growth of interest in sustainable tourism stimulates the interest on the part of foreign operators towards new destinations which are still at the margins of the tourist market. For the local community this can represent a big opportunity for economic development and professional growth through the collaboration with expert operators who are already consolidated in the market.</p>	<p><i>Changes in flight connections (natural factor)</i></p> <p>In the case of a tourist proposal aimed at foreign markets, the presence of convenient and cheap flights is the first condition of the creation of effective proposals which are capable of ensuring long term economic results.</p>
<p><i>Creation and/enhancement of a territorial brand (human factor)</i></p> <p>The creation of the “brand” of the territory constitutes an important way to reinforce the spiritual value of the area</p>	<p><i>Political instability and acts of terrorism (natural factor)</i></p> <p>These represent elements which are able to compromise, if not indefinitely then for long periods, the establishment of a tourist destination</p>

and of the products created within it.	
<p><i>Creation and/or commercialisation of local products (human factor) (capital factor)</i></p> <p>Tourism which is linked to the enhancement of the local resources represents an opportunity to produce and commercialise new local products for external markets. This is also a good way of counteracting the negative effects of the seasonality of tourism.</p>	<p><i>Increase in competition (natural factor)</i></p> <p>Every public administration, at all levels, has realised or is starting to realise the potentials of the tourist business. Therefore every area tends to create and sell its own attractions.</p>
<p><i>Creation of activities and of professional figures for the enhancement of local resources (human factor)</i></p> <p>Parallel with the development of tourism exists the affirmation of new activities and new professional figures who also belong to other sectors of the local economy.</p>	<p><i>Reduction in prices of tourist products (natural factor)</i></p> <p>The presence of a negative international conjuncture can be the cause of a general lowering of prices of tourist products, with the consequent reduction in returns.</p>
<p><i>Increase in the segmentation within the market of reference (human factor)</i></p> <p>The prevalence in the area of micro enterprises favours the reinforcement of a strong segmentation and differentiated products</p>	<p><i>Possible crisis of the model of the rural family due to insufficient generational exchange (natural factor)</i></p> <p>The abandonment of the locality by the younger generation creates the impossibility of handing down traditions etc. to the next generation.</p>
<p><i>Collaboration and exchange of competences between local communities and schools (human factor)</i></p> <p>The reinforcement of sustainable tourism must represent an opportunity to involve schools in the development of the area. The schools, in fact, perform an irreplaceable role both in the offer and in the tourist requirements and represent a useful tool to reduce the negative effects of the seasonality of tourism</p>	<p><i>New provisions of regulations (natural factor)</i></p> <p>In addition to the seasonality that generates precarious working conditions, the introduction of new regulations can also be the cause of the abandonment of the rural areas by the younger generation and of those with higher professional qualifications. An example of this is the recent abolition of visas for the citizens of Serbia and Macedonia which has already caused a surge in emigration towards EU countries.</p>
	<p><i>Increase in interest rates on bank loans (natural factor)</i></p> <p>In many developing countries interest rates are applied which are significantly higher than those of countries described as already developed. This determines a reduction in the profits for local operators who use the capital.</p>
	<p><i>More public support of other destinations (natural factor)</i></p> <p>The entry of new countries into the European</p>

	Community causes frequent modifications in the targeting of community aid which follows the identification of new, so-called “depressed” zones.
	<p><i>Increase in age of the travellers (natural factor)</i></p> <p>According to demographic trends, it is foreseen that in the next few years there will be a significant increase of the average age of the traveller. Owing to the considerations already described, this translates to a higher demand for organised packages.</p>
	<p><i>Local intolerance towards visitors (natural factor)</i></p> <p>The residents are the people who suffer most from the negative effects caused by tourism and from the eventual overcrowding of the area. This can be the cause of eventual intolerance of the visitors. This argument has already been described in the paragraph Tourism and the territory (Doxey 1975)</p>
	<p><i>Natural disasters (natural factor)</i></p> <p>Owing to the tight link between sustainability and nature, it seems superfluous to emphasise that if the natural heritage should be irretrievably compromised, all forms of tourism are destined to disappear.</p>
	<p><i>Fashions and foreign trends (natural factor)</i></p> <p>Tourism is a sector strongly influenced by image and as such depends on the macro-environmental and social external conditions to a great extent. The changes in fashion and trends are variable and therefore capable of quickly determining new tourist dynamics.</p>

The results of the SWOT analysis can be shown in the following table

<b>Type</b>	<b>S</b>	<b>W</b>	<b>O</b>	<b>T</b>
(human factor)	1	8	7	1
(capital factor)	0	3	1	0
(natural factor)	12	7	0	13

## **S: Strengths**

The prevalence of natural factors is emphasised, with respect to the other two factors that have almost negligible results.

This demonstrates that the strengths on which the company strategies depend are above all of external factors towards which the local operators exercise only indirect influence, for example managing to influence the decisions of public administration.

Within the points proposed, those that potentially can involve the presence of the local operator are:

- *Existence of events and country festivals* – the operator functions as a stimulus in the planning and organisation of local events
- *Presence of artisanal activities linked to the production that expresses the farming culture* – the operator is active within those processes that allow the creation of new artisanal activities or the development of those already in existence.
- *Presence of a moderate number of museums even if of small dimensions spread throughout the area* – the operator functions as a stimulus in the construction of new themed museums and collaborates in their management
- *Awareness of local administration of enhancement of the natural heritage* – The operator functions as a stimulus in the creation of new nature trails, reserves, observation points for bird watching etc, and collaborates further in their management
- *Awareness of schools of the values of sustainability* - the operator functions as a stimulus for diffusing awareness of sustainability in schools. For example, the operator can organise training for students on the structures of sustainability, meetings with students from schools, create information packs etc.

## **W: Weaknesses**

These are different from strengths where natural aspects prevail, as the weaknesses are divided equally between human and natural factors, while capital factors remain of minor relevance.

The points of criticism therefore depend both on factors outside the business and on human factors.

Regarding the human factors within the business organisation, problems of a professional and relational nature are particularly emphasised:

- *Communication difficulties* – local staff do not speak foreign languages. This is probably the result of a mix between lack of professionalism and lack of relational abilities hidden behind an unknown language
- *Narrow-mindedness towards guests* – local people do not start up dialogues, but consider the tourist simply as a customer/ consumer. Sustainability is not sincerely believed in, but used as a mere tourist attraction.
- *Narrow-mindedness towards the tourist project* – the local people do not share the vision of the project, but submit to it for simple economic reasons
- *Absence of managerial ability* – local staff do not possess the professional skills necessary to happily manage even a small enterprise
- *Tourist proposals that become “flat”* – these are a consequence of the lack of managerial ability. This refers to the inability to involve the tourists, therefore frustrating their expectations.
- *Difficulty of guaranteeing adequate levels of hygiene* – this probably derives from the lack of ability and interest in professional growth. This is a large obstacle for a good quality tourist proposal.
- *Disassociation of the local operators from the tour operators linked to the tourist market* – this is the joint result of the lack of managerial ability that often impedes the grasp of new development opportunities and the indifference towards the outside world that is often found in rural populations.
- *Difficulty in accommodating tourists who are disabled or who have even mild motor problems* – this is the joint result of the lack of adequate structures both internally and externally and the lack of professional ability which is required to manage situations that call for different behaviours and/or specific competences.

In regard to the natural factors which are emphasised, two of these depend on international issues against which the parties involved can do little:

- *Higher costs of goods of foreign production*
- *Scarce or non-existent internet connection*

While the other five:

- *Difficulty in offering sanitary assistance at an adequate level*
- *Difficulties and high costs in reaching the location*
- *Few tourist routes or themed, organised itineraries*
- *Difficulty in accommodating tourists who are disabled or who have even mild motor problems*
- *Seasonality*

can be counteracted, even if only partially, through adequate planning actions that involve different levels of commitment of local financial resources. We will see in the following, in fact, that the formulation of possible interventions both for private and public use will be considered according to the degree of feasibility that depends in the first instance on the financial resources required to carry out the interventions indicated. Never before this period has the need to maximise the yield of the few resources available to the local administration assumed such a central role in current political decisions.

### **O: Opportunities**

The analysis performed furnishes a clear and unequivocal indication regarding the opportunities that present themselves: these depend exclusively on human factors.

The local operator therefore carries out a primary role in the creation of the conditions that have the ability to create opportunities for the area.

### **T: Threats**

The picture that describes the possible threats is the absolute opposite of that of the opportunities. In this case the potential threats originate almost exclusively from natural factors, while the remaining one is a human factor, that as we have seen interacts only in an indirect way through local administration.

Of these the only ones that can play even a marginal role for the local operators are essentially these two:

- Natural disasters – the operators encourage local administration to plan the development of the area in a way which limits the risk of natural disasters. For example, the case of communes which declare themselves “denuclearised”
- Local intolerance towards visitors – the operators encourage the local administration to assume initiatives aimed at avoiding the manifestations of intolerance towards tourists, above all in the crowded period. For example, the construction of overflow car parks and the increase in numbers of traffic wardens on popular roads are some good solutions.

### **Conclusions**

The SWOT analysis applied to the technical management phase of a hypothetical tourist micro-organisation in a rural zone confirms the irreplaceable role of the local administration also in the development of the territory according to the principles of sustainability. The results show some situations on which successive efforts will be focused.

Considering the three analysed factors separately, the following concluding syntheses can be given:

- *The human factors contribute in a relevant way to the formation of the weaknesses in a local enterprise, while their contribution to the strengths is negligible. The same situation can be observed regarding the opportunities and threats: the human factors construct the opportunities, without creating potential threats.*
- *The influence of the capital factor is almost always negligible and, in fact, influences only a few weaknesses. The widespread habit of administration and local operators to justify their inactivity by a lack of financial resources, is often a way to hide their own limitations and inability to devise and develop a winning strategy for the area.*
- *The natural factors have a determining weight on both the strengths and weaknesses. They are passive regarding the opportunities, while for the possible risks they assume greater significance. All this confirms the great importance of the role carried out by public administration in local*

*development and the necessity of the close involvement of the local operators in the choices made with regard to planning the development of the territory.*

*Mantova Italy 2010*

*Prof. Fabio Cotifava*