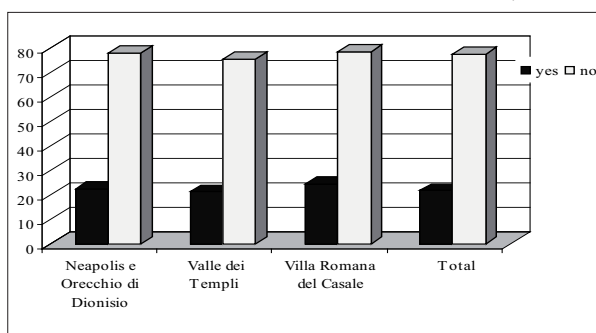


Casale and in the *Neapolis e Orecchio di Dionisio*, the young ones overcome 20% of the interviewed ones. The title of study mainly possessed is the school leaving certificate (43,38%) and the degree certificate (37,44%), recording a general incidence of graduates almost homogeneous in the three cultural sites. In order to understand in general the real interest of the visitors in the cultural and in the importance of the Cultural Heritage, two questions concerning the affiliation to some cultural association and the motive for the visit have been included in the questionnaire.

Almost 80% of the people interviewed don't belong to any cultural association and this datum is homogeneous in the three cultural properties (figure 4).

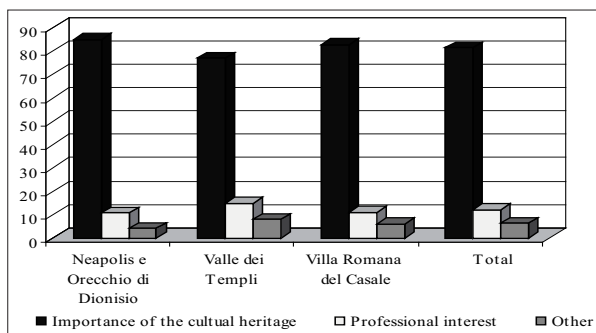
With reference to the motivation of the visit of the cultural sites, the figure 5 shows that the prevailing answer is the cultural importance of the site and therefore the interest connected to the cultural heritage.

Figure. 4 Affiliation to Cultural Association of the respondents total and for every site - relative distribution



The analysis for every cultural site reveals similar elements in the answers. In fact, the motivation "importance of the cultural heritage" varies between 77% in the case of the *Valle dei Templi* and 84,8% in the *Neapolis e Orecchio di Dionisio*.

Figure. 5 Motivation of the respondents total and for every site - relative distribution



General outline of the Cultural Sites

With reference to the data obtained through the first part of the questionnaire of self-assessment of the

managers and related to the structure of the Sicilian World Heritage Property taken in consideration, the *Villa Romana del Casale* is defined as an archaeological site and the *Valle dei Templi* and the *Neapolis e Orecchio di Dionisio* as archaeological and naturalistic sites. The three sites belong to the Sicilian Region and they are directly controlled. The cultural sites *Villa Romana del Casale* and the *Neapolis e Orecchio di Dionisio* are not endowed with any rule, while the *Valle dei Templi* has an inner rule.

On the basis of the data, in the *Villa Romana del Casale* and in the *Valle dei Templi* projects of improvement are in progress and respectively completed only for 35% and 50%. With reference to the *Neapolis e Orecchio di Dionisio*, some projects of improvement and others have been realised, up to today, they are in progress of completion, but the percentage of realization is not available. It is also remarkable to notice that the projects in progress of completion have caused serious problems near the *Villa Romana del Casale*, which have not allowed the complete visit of the site for quite a long time.

The evaluation of the cultural sites

The data concerning the second part of the questionnaire given to the visitors and of the questionnaire of self-assessment of the managers lead to the evaluation are destined to analyze, as already reported, the evaluation of the four different dimensions established by the model HERITY model, considered as fundamental in the management of the cultural heritage. The value attributed to the cultural site.

The preservation regarded as effectiveness to guarantee the enjoyment of the heritage to the future generations.

The communication, related to the effectiveness in to free the potentialities of the historical messages, artistic, cultural that good contains.

The services offered that make enjoyable the site.

This analysis doesn't aim to define unlikely classifications between cultural heritage, the objective is to furnish an immediate documentation leading to deepen, in other studies, the analysis in the cases in which elements of criticism are individualized for a certain area.

In general, the public has appeared less generous than the managers of the places. The table 2, reassumes the global scores assigned to the three cultural sites for every dimension by the visitors and managers that are able, therefore to express, at the most a value of 15 »points« for sector, since every sector ranges from 1 to 5 and a total of 60, with the indication of the variances among the judgment of the visitors and that of the managers and between the judgment of the visitors and the maximum attributable score.

A lower score is assigned by the visitors to the services offered (7) and the communication transmitted (7). These sectors have, got a higher score by the managers (table 2).

Table 2. Total score obtained in every sector by the three cultural heritage taken in examination

	Value	Preservation	Communication	Services
Visitors	12	8	7	7
Managers	12	11	10	10
Maximum value	15	15	15	15
Variance Visitors-Managers	0	3	3	3
Variance Visitors – Maximum value	3	7	8	8

It is remarkable to notice the opposite trend of the results achieved in the Sicilian cultural sites, where visitors express their dissatisfaction for the management of the cultural properties and a positive evaluation of the managers, in comparison to those recorded in the most part of Italian cultural sites that, up to today, they have achieved the

certification HERITY, such as the ecomuseums in Torino or some museums in Rome, and in which visitors have been more generous than the managers. Such difference could derive from the different applied methodology or from the different cultural and socio-economic realities of the territory in which the sites are situated. Finally, the table 3 shows the general score assigned by the visitors to the four sectors analyzed.

Table 3. Score assigned by visitor to every cultural site.

	Value	Preservation	Communication	Services
Neapolis e Orecchio di Dionisio	4	3	2	3
Valle dei Templi	4	3	3	3
Villa Romana del Casale	4	2	2	1

The worse result has been achieved from the *Villa Romana del Casale*, which has got the minimum score in the sector of the services.

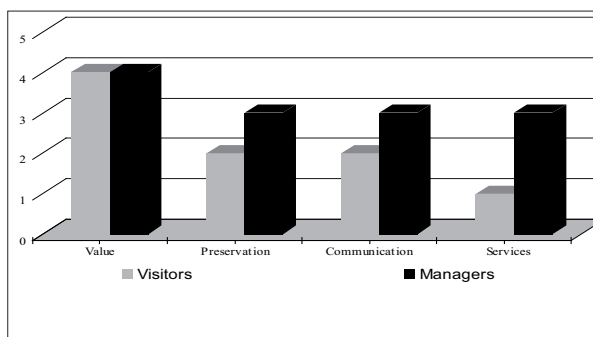
The *Valle dei Templi* and the *Neapolis*, have achieved a more elevated score, but also in this case the sector of the services and the communication have got the lowest scores

On basis of the acquired data it is interesting to notice the scarce use of the means of transport, in fact people interviewed have not expressed any judgment regarding the satisfaction of the means of transport, since they belonged to organized groups or they used their own means.

Villa Romana del Casale

The general evaluation of people interviewed near the *Villa Romana del Casale* has defined unsatisfactory and, therefore, inadequate some services essential for a cultural heritage. In particular, a negative judgment regarded the cleaning of the environment, the service of audiovisual projections and the illustrative brochures, the access facilitated for the disabled consumers, the level of reception, of courtesy and of competence of the personnel, the hygienic services.

Figure. 6 Evaluation visitors and managers - Villa Romana del Casale



The common opinion has been "... of an unique cultural heritage, of elevated beauty and importance, but abandoned to itself... ". The visitors' dissatisfaction can also be confirmed by the diminution of tourist presences in the year 2008. This feeling of abandonment is due to the incompleteness of the projects of restauration and improvement of the site.

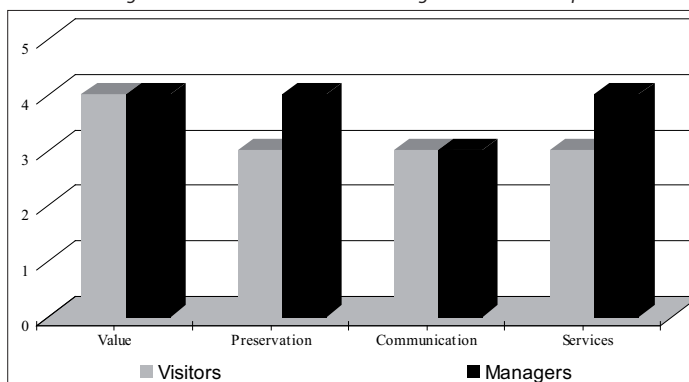
The preservation and the communication have also got a low score, 2 on 5, against an evaluation by the managers equal to 3.

Valle dei Templi

Valle dei Templi, in comparison to the other cultural sites, is the site that has reached the higher score by the visitors and a judgment more similar to that of the relative managers. In particular, both the visitors and the managers have assigned a vote equal to 4 to the value and equal 3 to the communication. The dimensions related to the services and to the preservation have reached a vote equal to 3 by the visitors, against a score equal to 4 by the managers.

The variables regarding the dimension of the services that have got a lower satisfaction by people interviewed are the inside indicative system of signs, the driven visits and informative brochures, the accessibility for the disabled consumers. The services that have recorded the higher satisfaction by the visitors are the courtesy and the competence of the personnel and the days and the visiting hours; in fact, the *Valle dei Templi* is the only site that allows evening visit. An elevated score has been assigned by the visitors to the cultural enrichment, to the popularization of the patrimony provided by the visit and to the state of preservation.

Figure. 7 Evaluation visitors and managers – Valle dei Templi

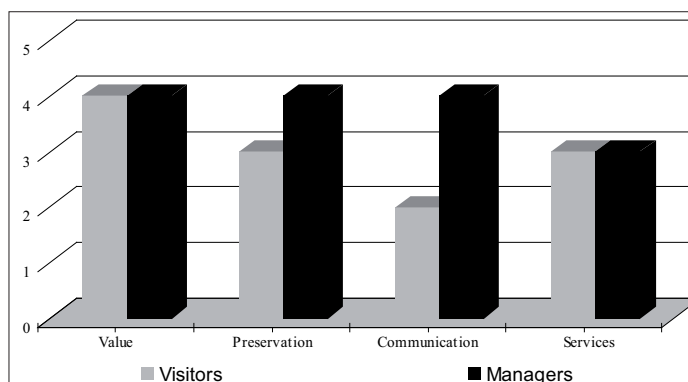


Zona Archeologica della Neapolis e Orecchio di Dionisio

The analysis of the quality by the visitors in the *Neapolis e Orecchio di Dionisio* shows the higher dissatisfaction for the area related to the communication, achieving a score equal to 2 on 5 by people interviewed, against a score equal to 4 on 5 assigned by the managers. In particular, the higher dissatisfaction has been recorded for the inadequate information on the cultural heritage provided by explanatory panels, illustrative brochures and for the scarce presence of direct and recorded testimonies.

The dimension related to the value has got, as for the other two observed sites, the higher score (4 on 5) in comparison to the other areas, both by the managers and by the visitors. The judgment of people interviewed and managers results similar regarding the services, that have achieved a discreet score, equal to 3 on 5. The higher dissatisfaction has been recorded by the visitors with reference to the access to the patrimony online and to the service of audiovisual projections and driven visits. Lastly, the visitors have also assigned a score equal to 3 to the preservation; dimension that has achieved, instead, a higher evaluation (4 on 5) by the managers.

Figure. 8 Evaluation visitors and managers - Neapolis e Orecchio di Dionisio



CONCLUSIONS AND PERSPECTIVES

The actual situation of the World Heritage Property in Sicily seems to show an elevated appreciation by the visitors and by the managers for their importance, oneness and beauty. In fact, the value is the sector with the higher score achieved by the three cultural heritage and assigned both by the visitors and by the managers.

Nevertheless, the awareness of the immense value present in Sicily does not encourage the Local Authorities to transmit the historical, artistic and cultural messages that these cultural properties possess. The communication results the sector with the lowest score from the public.

Except the *Valle dei Templi* that has got a score equal to 3 on 5 for the communication, the *Neapolis* and the *Villa Romana del Casale* have obtained only 2 points on 5.

Another aspect of fundamental importance for the management of the cultural heritage is the ability of preservation for the creation, the maintenance or the growth in the time of the cultural value and to guarantee the enjoyment of the heritage to the future generations. In the cultural properties taken analysed, the preservation is an aspect susceptible of improvements, getting a score of 2 on 5 by the visitors and 3 on 5 by the managers in the *Villa Romana del Casale*, against a score of 3 on 5 assigned both by the visitors that by the managers to the *Valle dei Templi* and the *Neapolis e Orecchio di Dionisio*.

Finally, other critical sector for the *Villa Romana del Casale* and for which is necessary to plan some improvements is that of the services, that has obtained only a score equal to 1 on 5 by the visitors.

In the *Valle dei Templi* and in the *Neapolis e Orecchio di Dionisio*, despite the sector of the services has obtained a score of 3 on 5, it is the sector which has obtained the worse results by the visitors.

This study provides the first results of an ampler project of search and offers a methodological picture essential for the organization of future investigations. It will surely be necessary to conduct further studies to deepen the analysis in the cases in which there are more dissatisfaction and to extend the assessment to Sicilian cultural sites with access not checked, by modifying the model. Another important objective will be to appraise the management of sites of the World Heritage Property belonging to other Italian regions, with the purpose to understand if the possible differences between the results of the Sicilian sites and those of the other Italian regions are tightly tied to the socio-economic characteristics of the territory in which are situated.

Finally, this study points out the necessity of an activity of permanent formation addressed to the officials and managers of the sites.

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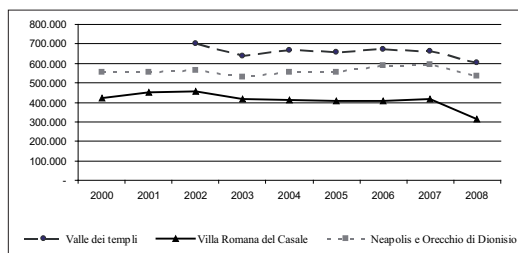
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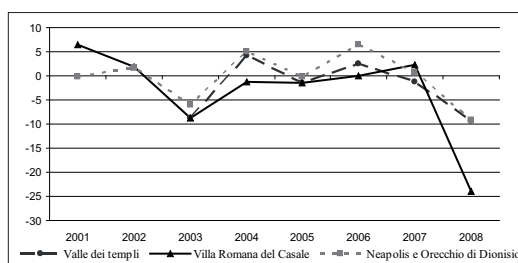
APPENDIX

Figure 2- Flows of visitors - absolute values -period 2000 - 2008



Source: own elaboration based on data provided by Regione Sicilia – Assessorato Beni Culturali, Ambientali e Pubblica Istruzione

Figure. 3 Flows of visitors - percentage variation - period 2001 – 2008



Source: own elaboration based on data provided by Regione Sicilia – Assessorato Beni Culturali, Ambientali e Pubblica Istruzione

Table 1. Sex, Age and Qualification of respondents total and for every site – relative distribution

	Neapolis	Valle dei Templi	Villa Romana del Casale	TOTAL
SEX				
Male	58,70	48,65	70,71	60,73
Female	41,30	51,35	29,29	39,27
AGE				
1 ---25	21,74	2,70	21,21	15,07
26 -- 55	54,35	67,57	65,66	63,93
> 56	23,91	29,73	13,13	21,00
QUALIFICATION				
Middle School certificate	8,70	9,46	22,22	15,07
School leaving certificate	56,52	36,49	42,42	43,38
Degree Certificate	28,26	45,95	35,35	37,44
Other	6,52	8,11	0,00	4,11

Figure. 4 Affiliation to Cultural Association of the respondents total and for every site - relative distribution

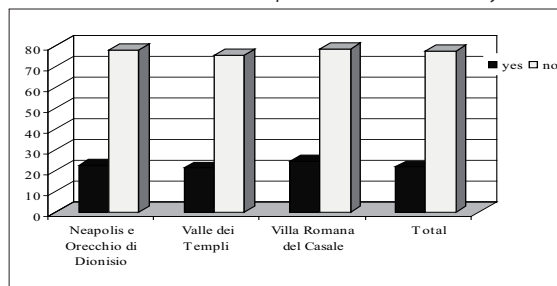


Figure. 5 Motivation of the respondents total and for every site - relative distribution

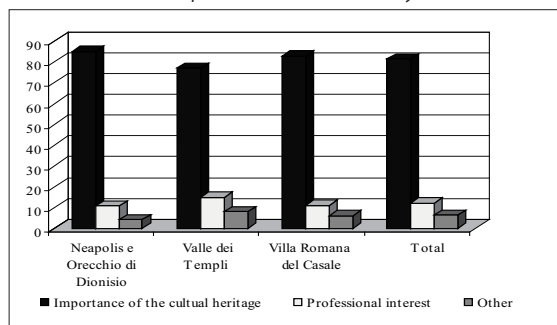


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	Value	Preservation	Communication	Services
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Villa Romana del Casale	4	2	2	1

Figure. 6 Evaluation visitors and managers - Villa Romana del Casale

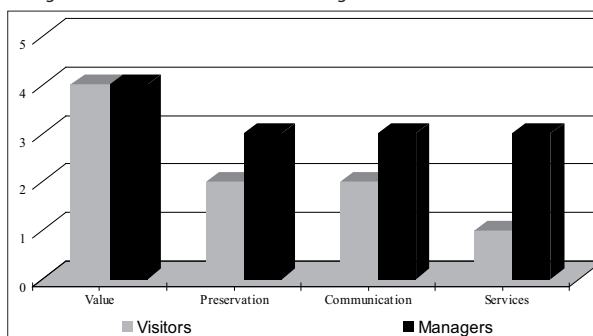


Figure. 7 Evaluation visitors and managers – Valle dei Templi

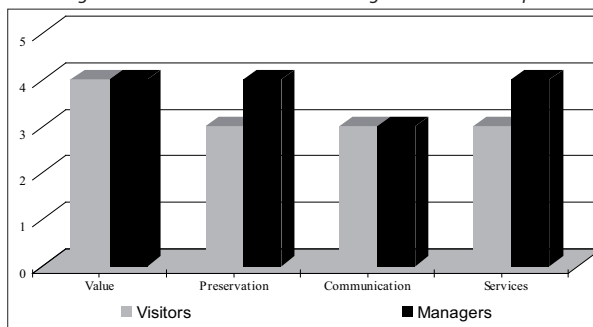
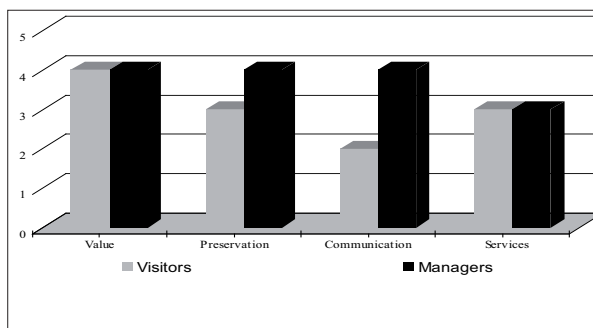


Figure. 8 Evaluation visitors and managers - Neapolis e Orecchio di Dionisio



WINE TOURISM FOR THE DEVELOPMENT OF THE AMALFI COAST

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Abstract

Tourism and leisure worldwide goes through changes: alternative and sustainable tourism stand out, contrasting the effects of mass tourism, and respectful of nature as well as ethnical, historical and anthropological distinctiveness of local population. Forces of change are: new consumer behaviour, the ability of the players in the demand segmentation, and the global competition of destinations. Research in Italy shows a sudden increase in thematic tourism and its trend to specialize. This kind of tourism is characterized by different development processes and territorial dissemination often due to intangible resources as entrepreneurial capabilities rather than original tourism vocation of territories (ACI-CENSIS, 2008).

As niche tourism, wine tourism is nowadays a settled, but still increasing, phenomenon, also in Italy where it embodies local identity and its precious tangible and intangible resources. This is particularly true in Southern Italy as it boasts excellent grape growing and wine production and is endowed with valuable natural, cultural and historical resources.

This paper stems from a review of the international and national literature on wine tourism mainly aimed at describing the phenomenon and identifying the main *drivers* for its development. The second phase of this research work is aimed at probing the existence of such *drivers* for the development of wine tourism in the Amalfi Coast, an area of great physical beauty and natural diversity, in the Southern Italian region of Campania. The current state of wine tourism in the area is also investigated, in both quantitative and qualitative aspects. The case- study was undertaken through a desk analysis of official and secondary data sources and a empirical survey on the wineries of the area.

The case-study results offer guidelines, suggestions, and recommendations useful to local actors, in order to diversify the tourism product by enriching tourists' experience and their perception of the Amalfi Coast as a destination.

Key words: wine tourism, development drivers, Amalfi Coast

INTRODUCTION

Tourism has been widely considered and promoted as an integral element of rural development policy, aimed at reducing disparities between urban and rural areas, and achieving a more balanced, harmonic and sustainable development of the whole territory. Indeed, this sector can play a significant developmental/ regenerative role for peripheral rural areas (Sharpley 2002; Sharpley & Vass, 2006). Specifically, a number of economic and social benefits may be obtained through the development of rural tourism: employment

¹ The research work was carried out jointly; A. Mancino wrote sections n. 1, 3, 5, 6.2, and F. Rapone wrote sections n. 2, 4, 6.1. The concluding section is attributed to both authors.

creation, income growth, creation of new markets for agricultural products, re-population of the rural area, maintenance and improvement of public services, revitalisation of cultural identity, local customs and traditions; protection and improvement of both the natural and built environment (Sharpley 2002).

However, more recently, tourism in rural areas is also being promoted as a strategy for destinations to diversify their tourism products and markets. Especially in traditionally summer-sun destinations, tourism in rural areas can be a means of achieving a number of tourism development policy objectives, such as mitigating the problems of seasonality; promoting the cultural attractions of the destination, attracting more visitors and/or extending the length of their stay and spending (Sharpley, 2002).

Furthermore, the increase of tourism in rural areas also comes from the diversification in leisure interests, that gives rise to the demand for new forms of tourism. According to Opaschowski (cited in Trauer 2006) tourists are looking for emotional stimuli, they want to experience the destination's immaterial qualities, seeking ambiance, atmosphere and aesthetics, as well as looking for sharing the host community's culture and identity. Also searching for authentic flavours, local products tasting and rediscovering of their production areas are underlying trends that give rise to a demand for tourism based on the discovery of the culture and identity of a territory. In this framework, local agricultural production can be seen as being more than a source of food and/or beverage, for it may increase tourist satisfaction, through the landscapes and rural activities which they can appreciate and enjoy (Cox & Fox, 1991; Telfer & Wall, 1996). Thus, particularly in the regions where local economy is predominantly agricultural, creating connections between agriculture and tourism holds great importance not only for the host destinations (Torres, 2003), but also for agribusinesses who can profit from this situation by becoming more involved in agriculturally based leisure attractions (Cox & Fox, 1991).

As a new sub-field of tourism, wine tourism represents an increasingly significant component of rural tourism products (Bruwer, 2003) and can notably contribute to the development of destinations, by the enhancement of the local grape varieties, and the local culture and traditions related to grape growing and wine production. This is particularly true in Southern Italy as it boasts excellent traditions in grape growing and wine production, as well as being endowed with valuable natural, cultural and historical resources.

In this paper the case of the Amalfi Coast is presented, an area of great physical beauty and natural diversity. Highly attractive from the tourism point of view, it is located in the province of Salerno in the Southern Italian region of Campania. Wine tourism is believed to contribute to further promoting tourism in the area in the medium-long term. The aim of the paper is, therefore, to verify the current state of development of wine tourism in the Amalfi Coast and to explore the potential for further development.

The paper is structured as follows. First, a brief review of the literature on wine tourism is presented, in order to describe the phenomenon and identify the main *drivers* for its development. The aims of the following sections are, respectively, to describe the research methodology, and to discuss the main research results. In the final section some conclusive remarks are provided.

WINE TOURISM

It is not an easy objective to attempt to univocally define wine tourism, because different approaches can be adopted in studying this new sub-field of tourism.

At a very general level of discussion, three major perspectives on the subject can be identified: that of consumers, wine producers, and destinations. Most definitions of wine tourism are consumer-oriented and remark travellers' motivation and experience. For example, Hall and Macionis (1998: 267) define wine tourism as "visitation to vineyards, wineries, wine festival and wine shows for which grape wine tasting and/or experiencing the attributes of a grape wine region are the prime motivating factors for visitors". Likewise, Charters and Ali-Knight (2002) state that the wine tourism experience can be provided in a number of ways,

the most notable being events and festivals, cultural heritage, dining, hospitality, education, tasting and cellar door sales, and winery tours. A wider definition adopted in 2002 by the Winemakers' Federation of Australia (WFA, 2002) extended the concept of the experience by associating the enjoyment of wine at its source with the experience of the unique qualities of contemporary lifestyle.

From the wine producers perspective, wine tourism is mainly considered in terms of marketing, including building brand loyalty, and sale strategy (Dodd, 1995). Accordingly, Antonioli Corigliano (1999) describes wine tourism as a tourism product, essentially composed of service, and aimed at boosting the consumption of wine. However, the Author also embraces the consumer perspective when she maintains that, through the building of virtuous circles, wine tourism not only facilitates the knowledge and promotion of wine, but also offers visitors the opportunity to gain direct knowledge of the territories of production and experience distinctive atmospheres. In other words, wine tourism is a particular segment of cultural tourism, with the wine tourist being interested not only in the wine product and rural cultural environment, but also in the territory, its landscapes, and natural, historical and cultural resources (Antonioli Corigliano & Mottironi, 2004).

Finally, from the destination perspective, wine tourism is a destination development strategy through the increase and marketing of wine-related attractions.

However, it has been advocated that these three perspectives should be concurrently considered (Getz, Dowling, Carlsen, Anderson 1999; Getz 2000), concerning wine tourism simultaneously as "a form of consumer behavior, a strategy by which destinations develop and market wine-related attractions and imagery, and a marketing opportunity for wineries to educate, and to sell their products, directly to consumers" (Getz & Brown, 2006: 147).

The general aim of the IRAT-CNR working group's research was to identify the key factors affecting the competitive success of a wine producing area in the wine tourism market, in accordance with the dual perspective of the destination and of the wine producers. Indeed, the opening of wineries to visitors surely constitutes an opportunity for increasing their direct sales. However, the diversification of the winery's *core business*, by the provision of tourism services, is also, and above all, an opportunity for them to promote business innovation and growth, as well as an opportunity for the destination for its development by enriching the tourism offer.

METHODOLOGICAL APPROACH

Preliminary national and international literature review on wine tourism was conducted, with the aim to identify the main *drivers* for its development.

Subsequently, an empirical survey was carried out in the Amalfi Coast, a highly attractive area from the tourism point of view and believed to have high potential for wine tourism development. The case-study was undertaken through both a desk analysis of official and secondary sources, and an in-depth analysis of the wineries of the Amalfi Coast which have gone into the tourism sector, with the aim of probing the presence of wine tourism development *drivers* in the area.

More specifically, the empirical field research involved the seven wineries of the Amalfi Coast whose wines have earned an Italian certification of quality. Indeed, the production of premium quality wines plays a central role in order for a winery to successfully develop wine related activities.

The empirical survey was carried out in the Summer 2009. A semi-structured on-line questionnaire was submitted to the wineries, previously contacted by e-mail, in order to briefly explain the aims of the research, and provide the instructions for accessing and filling in the questionnaire. Four out of the seven wineries returned the questionnaire by the end of September.

The questionnaire submitted to the wineries was sub-divided into four sections.

The questions of the first three sections were respectively aimed at obtaining the following data:

- winery structure and business
- forms of wine tourism development (i.e. how firms provide the wine tourism experience)
- communication activities and tools.

The fourth section of the questionnaire was devoted to investigating the entrepreneurial aptitude of the winemakers. Specifically, questions were aimed at examining the following features:

- psychological traits and competences of the wine/ tourism entrepreneurs
- motivation and previous experiences
- perception of the external environment.

Furthermore, believing that more in-depth responses and further comments on certain issues could have been obtained by an informal interview with the winemakers, they were contacted by phone in order to make an appointment to visit their firms. It is worth noting that the three winemakers who did not return the questionnaire were neither willing to receive our visit.

The results from the desk analysis and the empirical survey enable us to determine the current state of wine tourism in the Amalfi Coast and identify some areas of intervention to promote and support further development in the medium-long term.

THE AMALFI COAST

The Amalfi Coast is an area located in the Province of Salerno in the Southern Italian Region of Campania. It consists of about 42 kilometres of coast between Vietri sul Mare and Positano and it includes some inland villages as well. The whole area covers 11,231 ha in 15 Municipalities: Amalfi, Atrani, Corbara, Cetara, Conca dei Marini, Furore, Maiori, Minori, Positano, Praiano, Ravello, Sant'Egidio del Monte Albino, Scala, Tramonti, Vietri sul Mare. None of the mentioned municipalities have more than 10,000 inhabitants and total resident population of the area is less than 60,000.

The Amalfi Coast is a coastline appreciated and enjoyed by tourists from around the world and has a consolidated tourism reputation: Amalfi, Positano, Ravello and Maiori recorded more than 800.000 stays in 2007 (Istat, 2007). Numerous features make the Amalfi Coast highly attractive from the tourism point of view: richness and heterogeneity of natural habitats, wonderful landscapes, historical, artistic and archaeological heritage, community traditions and habits, and also traditional skills linked to local productions - food and wine and handicraft. In 1997, the Amalfi Coast was included in the World Heritage List as "an outstanding example of a Mediterranean landscape, with exceptional cultural and natural scenic values resulting from its dramatic topography and historical evolution" (UNESCO, 1997).

The accommodation supply is among the most developed and qualified of the Campania region. In 2007, it counted 151 hotels, and 150 other accommodation typologies (of which 80 rent houses and 47 B&B) with a total number of 8,999 beds; 31.57% of the 5 stars and 5 stars luxury hotels of the entire region were located in the Amalfi Coast².

Grape growing and wine production are among the main agricultural productions of the Amalfi Coast. The distinct feature of this production stems from the unique physical characteristics of the territory: vines grown on terrace hills sheering to the sea, an amazing sight which presents a dramatic and unique landscape to visitors. The adoption of specific and unusual agricultural practices is required in order to adjust to the characteristics of the territory. Furthermore, ancient traditions that have been jealously fostered and skilfully handed down are embedded in these practices, contributing to the distinctiveness of grape growing and wine production in the Amalfi Coast. The more tangible expression of such a distinctiveness is the distinction of the territorial brand of quality³.

² Our elaboration on data Istat, 2007.

³ Some wines of the Amalfi Coast, for example, achieved the Italian "Costa d'Amalfi DOC" (controlled origin denomina-

In light of the considerations above, the potential of wine tourism in the Amalfi Coast is believed to be high and its contribution for the development of the destination can be remarkable in the medium-long term.

MAIN DRIVERS FOR WINE TOURISM DEVELOPMENT

The literature review on wine tourism shows that there are a set of factors that contribute to encourage visits to wineries and wine regions. Indeed, production of local wines, even if a necessary condition, cannot by itself turn the producing area into a wine tourism destination (Savoja, 2008).

Of course, the quality of wines represents one factor of development. Wines of superior quality are strongly attractive and can significantly encourage visitors' access to wineries; in the same way, the established reputation of wine makers or wineries, the willingness to provide a friendly welcome in the winery and the quality of accommodation can play a central role (Antonioli Corigliano, 1999; Pastore, 2002; Cinelli Colombini, 2007).

A study conducted in Spain (Vincente Elias, 2008) also demonstrates the importance of the vineyard landscape as a complement to the winery visit, and as a resource to enhance the development of wine tourism. Moreover, the same author highlights that the acknowledgement by UNESCO of some vineyard landscapes as World Heritage constitutes a factor that generates tourism.

Proximity of destination to the area of origin is a factor that plays a part in pulling visitors to a specific destination (Charters, Ali-Knight, 2002; Bruwer, 2003). This is particularly true in wine tourism, where often the majority of tourists are local and regional in origin (Getz, 2000). According to the author, many wine tourism destinations are heavily dependent on the demand generated by nearby urban populations, but proximity to cities or, more extensively, to areas where items of interests are already available to visitors, can also represent an opportunity for wineries to capitalize on this tourist traffic (Cinelli Colombini, 2007).

Also the importance of the existence of a Wine Route has been highlighted in literature (Antonioli Corigliano, 1999; Telfer, 2001; Cinelli Colombini, 2007) as "it is the 'roadway' to the wine tourism core attraction – the wines and the winery (Bruwer, 2003).

However, in the process aimed at turning a territory into a wine tourism destination, entrepreneurship is believed to be one of the most important factors - if not the most important one - in order for wineries to successfully develop wine related activities. Among the economists who have significantly contributed to the theory of entrepreneurship, Joseph Alois Schumpeter (1934) maintains the equation entrepreneurship-innovation, by defining entrepreneurial function as typically consisting in subtracting resources to their customary use in order to introduce new combinations. Antoncic and Hisrich (2003) also clarify that entering new, unfamiliar businesses in terms of product/markets can be considered intrapreneurial activities (i.e. entrepreneurship in existing firms) since they represent departures from the customary ways of doing business. Accordingly, the wine maker or wine grower's decision to include in their activity the provision of services that do not fall within the *core business* postulates an entrepreneurial aptitude (Antonioli Corigliano, 1999).

According to Lafuente and Salas (1989), personal characteristics of entrepreneurs influence entrepreneurial behaviours and activities. The entrepreneurial aptitude of the Amalfi Coast wine/tourism entrepreneurs has been explored by investigating their personal characteristics in terms of personality traits, competences, motivation, and work experience. Also the subjective perception of the external environment, mainly in terms of obstacles and opportunities, has been explored, in the belief that the attitude towards the environment is important in comprehending the behaviour of entrepreneurs and the network of relationships created by the firm.

tion) mark in 1995. It guarantees the quality of a wine and the origin of the grapes. These marks are controlled and tested by experts to certify the quality of the wines, and are reserved for wines that have the specific characteristics of the area of production.

EMPIRICAL RESULTS

Winery firms

The investigated wineries of the Amalfi Coast, on the basis of number of workers, are small or micro firms. The firms are family businesses since ownership and control of the business overlap with family membership (Birley, Ng & Godfrey, 1999).

They have a small scale production, just one winery produces more than 100,000 bottles per year, but of very high quality: 94% of the total production of the investigated wineries is certified (DOC, IGT). Three out of four sell directly at the cellar door making up over 7 % of total sales. Not even one has implemented direct sales through web sites.

A result that emerges from the survey is that wineries have been involved in wine tourism for less than 10 years except for a pioneer winery that has opened the cellar to visitors since 1983 and has an international recognition of its wines and whose total number of visitors is high above the average of others.

However, the wine tourism supply of the Amalfi Coast is characterized by great hospitality and authenticity: tourists are welcomed and attended to during their visit by the owner or by the owner's family. All wineries offer visits to the cellar, wine tasting and meeting winemaker and/or the oenologist; only 2 wineries offer overnight and local food, vineyard or wine cellar experiences. Wineries are open everyday all year round but they require a reservation for a visit.

The questionnaire also generated a classification, based on a winery perspective, and by origins of visitors to the wineries of the Amalfi Coast. It emerges that they are mainly international, and the main reason could be the vocation of this area to international tourism.

On the basis of discussions with winery owners, it also emerges that the visitor usually has a good or high knowledge of wine.

Traditional communication tools are used by the wineries of the Amalfi Coast: brochure and insertion in regional wine guides are the major communication actions used both for wine and tourism related activities.

All wineries participate in wine fairs. Hallmark events are assumed to have a key role in firm wine marketing and promotion strategy (Hall & Mitchell 2008). Moreover three wineries produce some events within the firm.

Overall, the wineries do not fully exploit the opportunity to gather market intelligence at the cellar door that would allow them to fine tune their advertising and promotional activities (Hall & Mitchell 2008). Indeed, none of the wineries collect information about the place of residence of their visitors, only one commonly inquires about how visitors heard about the winery, and their feelings about the winery's offers. This winery is also the only one to collect the address (postal and/or e-mail) of its visitors, demonstrating the perception that every visitor is a potential loyal customer (Getz 2000).

Even though wineries have their own web site, and three of four have an English version as well, the lack of an effective marketing strategy on the web has been noticed. Only one winery declared to produce ads on-line, while none make use of participatory communication tools such as a blog that is highly valuable in the wine industry in obtaining direct feedback from users, at the low cost of this technology permits (Resnick 2008).

Entrepreneurial Aptitude

The entrepreneurial personality traits that most frequently recur in the international literature are: creativity, need for achievement (*n-Ach*), internal locus of control (*LOC*), tolerance for ambiguity, and propensity to take risks (Entrialgo, Fernandez, & Vázquez 2000; Envick, & Langford 2000; Stewart, Watson, Carland, & Carland 1999; Alstete 2002). Accordingly, the presence of these five traits has been verified.

Schumpeter (1934) remarked that an individual behaves as an entrepreneur only when carrying out innovations. Thus, creativity is the prime factor in the entrepreneurial personality and function. *N-Ach* can be defined as the propensity to set challenging goals and improve their standard of excellence

(McClelland 1961). The conviction of an individual that he himself rather than external events is in control of his destiny constitutes his internal LOC (Rotter 1966). Budner (1962) defines intolerance for ambiguity as the tendency to perceive ambiguous situations as sources of threat. Conversely, tolerance for ambiguity implies a more neutral perception of uncertainty and can be defined as the willingness of an individual to cope with it. Risk taking is invariably a factor in entrepreneurial behaviour, even if research examining the risk propensity differences among entrepreneurs and managers, has produced conflicting findings (Ahmed 1985; Begley & Boyd 1987; Hull et al. 1980; Brockhaus 1980; Brugnoli 1990).

All four interviewees declare to be achievers. Only one winemaker claims to possess the other traits investigated as well. Of the remaining three respondents, no one declares to be in control of his destiny, nor to tolerate ambiguity, nevertheless, two recognize themselves as being creative. This evidence leads us to presume incoherence in the answers given by the interviewed⁴. It is also worth stressing that entrepreneurs do not desire other personality traits. This may disclose the unawareness of their deficiencies.

As for competences, the most remarkable negative result is the lack of marketing skills (possessed by only one interviewee) that have been found to be meaningful skills for successful entrepreneurs (Hood & Young 1993). Also, the capability to rely on heuristics to make decisions is possessed only by two winemakers, where the heuristic-based logic can help entrepreneurs in the pursuit of innovative activities (Alvarez & Busenitz 2007). Conversely, winemakers claim to possess managerial skills.

With regards to motivation, the Amalfi Coast winemakers are *opportunity entrepreneurs*⁵, as their decision to become entrepreneurs has been mainly influenced by passion and desire to exploit their own skills/ideas. In addition, they have gone into the tourism business in order to pursue a business opportunity. This is an encouraging result given that higher growth expectations are more frequently associated to opportunity entrepreneurship (Reynolds et al. 2002).

A number of authors have also argued that direct and indirect experiences are factors that may affect the decision to become an entrepreneur. To confirm such a theoretical assumption, winemakers state that entrepreneurial family background and their own previous work experience had an influence on their choice. Lerner and Haber (2001), more in particular, found that entrepreneurial family background is positively related to the tourism firm's performance.

Finally, the perception of the external environment was investigated. This is an important aspect to consider because entrepreneurs make decisions significantly influenced by the environment (Minniti, 2000). A perception emerges of the external environment as being inadequate for wine tourism activities development. Infrastructural weaknesses, lack of skilled labour and relations with Public Administration are indicated as the main obstacles in the sector of operations. In other words, entrepreneurs mainly perceive exogenous obstacles as unable to cope with. It is not surprising, given the admitted lack of internal control. Mistrust emerges in the possibility of collaborating with external parties (competitors, professional associations and Public Administration). This negative perception of external environment could discourage the propensity of local entrepreneurs to lead the firms towards further expansion.

In conclusion, the results lead us to assert that the Amalfi Coast wine/tourism entrepreneurs do not display high entrepreneurial aptitude. Specifically, the absence of those psychological traits and competences which could influence entrepreneurial behaviour and performance, as well as the subjective perception of the environment as being not conducive for development of wine tourism business support this statement.

4 In previous research, internal locus of control was found to be associated with the need for achievement (McClelland et al. 1953; Rotter 1966), with risk propensity and creativity (Entrialgo et al. 2000). Furthermore, Entrialgo et al (2000) reveal that a positive relation between creativity and tolerance for ambiguity also exist.

5 According to the Global Entrepreneurship Monitor (Gem) (Reynolds et al. 2002) opportunity entrepreneurship reflects a voluntary choice to start/run a business, based on the perception that an unexploited or under exploited business opportunity exists or can be created. On the contrary, necessity entrepreneurship represents a form of entrepreneurship in which necessity (lack of choice in work, poverty, or survival) is the prime motivation for starting/running a business, based on the individual's perception that no better option is available.

A limitation of our survey on the entrepreneurial aptitude of the Amalfi Coast wine/tourism entrepreneurs could be found in that it reflects their perception of their own abilities and skills. However, it has been maintained (Boyd & Vozikis, 1994; Bandura, 1997) that the perception of one's capabilities influences choices, aspirations, and commitment.

CONCLUSIVE REMARKS

The paper presents the case study of the Amalfi Coast on the hypothesis that wine tourism can remarkably contribute to diversification and integration of the tourism supply in the area, in the medium-long term.

According to Butler's model of the tourist area cycle of evolution (1980), the Amalfi Coast is currently in the exploration stage as a wine tourism destination. It is characterized by irregular and low visitation patterns, high percentage of non-local visitors (80% of the visitors come from out of the region), no specific or few facilities for wine tourists, no impact on physical fabric and social milieu of the area.

However, the wine tourism potential of the Amalfi Coast has emerged from the research. More specifically, the study has verified the presence of some of the key factors, which in specialised literature on the subject, have been found to significantly contribute in the development of a producing area into a wine tourism destination. These factors include:

- exceptional cultural, historical, natural and landscape values;
- the high presence of tourists in the area, and its proximity to other attractive areas (e.g. Naples, Capri, Salerno...);
- the accommodation supply among the most qualified and developed of the whole territory of the Campania region;
- the uniqueness of vineyard landscapes and the peculiarity of the resulting agricultural practices;
- the ancient traditions embedded in these practices;
- the distinction of the Costa d'Amalfi DOC wines.

These are the factors that should be focused on in order for the area to reach the competitive success in the wine tourism market.

To realize the full benefits related to this emerging tourism form, to increase visitor numbers and achieve some regularity, wineries could improve services and facilities, providing a better experience for visitors and consequently increase their attractiveness and competitiveness.

Actually wineries are undertaking these issues and there is an expectation of growth. Despite this aspect, wine tourism is also facing a critical development issue: protection and management to ensure the conditions of integrity and/or authenticity is critical, as the area has recently been listed in the UNESCO World Heritage.

The wineries should undertake more systematic and effective market research at the cellar door: to recognise the visitor's motivation, needs, and expectations is essential to a successful marketing programme and direct sales. A simple, yet effective approach to market research could be the implementation of short and easy surveys to visitors.

Since the wineries of the Amalfi Coast are small firms, they have limited human resources and finances available, which inevitably reflect on the supply's variety. In this context, the quality of the supply stands on the creation of synergies and integration among all the actors of the area, going beyond the specific strategies of the single firm. For example, the development of the Wine Route is an auspicious solution and a valid instrument in order to match formal and informal collaboration among wine makers and other local businesses, whether touristic or not; this is also a unique opportunity for small firms, as they can develop and participate in various initiatives otherwise impossible for them to afford for their high organizational, and financial weight.

Moreover, wineries can improve their relations with tour operators. This type of relationship has become increasingly important in the development of wine tourism (Telfer, 2001).

Regarding the evidence on the entrepreneurial aptitude of the winemakers, on a general level of discussion, it can be pointed out that policies are required to support education in entrepreneurship topics, in order to foster a wider entrepreneurial culture that encourages the start-up, development and growth of *entrepreneurial firms*, instead of merely business ventures (Carland et al, 1984). In more specific terms, there is the necessity to provide entrepreneurs with tailored educational tools. Accordingly, in the light of the results of our survey on the Amalfi Coast wine/tourism entrepreneurs, in designing education programmes, greater emphasis should be put on the training dimension, i.e. skill acquisition and development of those psychological characteristics which are important for entrepreneurial activity. Indeed, the result of Hansemark's study (1998) clearly indicates that psychological characteristics could be stimulated in a fairly normal educational situation. Lastly, participants should be taught to perceive their external environment as something which they can influence rather than viewing themselves as helpless within their specific environments.

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TOURIST FORMS AND SOCIAL SUSTAINABILITY. AN EXAMPLE OF RELATIONAL TOURISM IN SARDINIA

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Abstract

The diachronic and synchronic analysis of the dynamics and the tourist typologies puts in evidence problems and elements of crisis of the contemporary tourist phenomena. The actual situation returns a picture particularly faceted both as it regards the choices of the tourist, both for the one who creates the offer and it manages the question, and for the local societies that entertain the tourist flows.

Tourism is increasingly seen as an industry that creates economies rather than a tool to regenerate urban and regional planning and indeed, often, the tourism policies are proving more oriented to the practices related to receptivity and so to the structures whether to consume the vacations, rather than to create occasions, real and not symbolic, of comparison between tourist and local society.

Besides, often the tourist forms that celebrate itself sustainable put in strong emphasis either the economic sustainability or that environmental, but is it enough to exclusively consider the economic and environmental processes to be able to affirm that a tourist form is sustainable? Can a sustainable tourism socially exist?

Sardinia offers an interesting field of research to study the evolution of the tourist politics, above all in comparison to the relationships between tourist and local society, because it has been, and it is still, one of the destinations of trip more aspired both in the set of the international tourism and for the one who seeks niche forms, however the tourist politics, that have driven the development of the different forms, have been driven in meaningful way, during the years, from what that can be defined the tourist ideology.

Tourist ideology is the whole politics and actions that conduct to superficial fruitions of the territories, to gentrification processes, to address only the tourists on some territories, to set attention only to the receptive practice.

There are however some small but significant changes in tourism context in recent years, also remaining in the set driven by the tourist ideology, with the search of new forms directed mostly to the relationship between local society and tourist, through a diffusion of the tourist flows not only along the coastal areas but also toward to the more interior territories.

The tourist knows that an authentic tourist experience doesn't exist, but there are only a series of games and scripts that can be interpreted, time for time, from who organizes and manages the tourist forms and even from the local societies.

There is a need to go beyond the ways traced by the tourist ideology with the purpose to track new forms down where find again the principles of the "relational tourism", new and unexpected forms which tourists and local society can enter in contact in a not programmed and not etero-organized way, in which the optimal conditions to the "mutual vulnerability" among guest and hosts are created.

Sardinia's tourist territory, in reason for its complexity and the contemporary necessity to identify new touristic forms that don't pursue the principles of the tourist ideology, as optimal place offers itself to reason on the possibility to identify appropriate fields and cases of study for new relational forms that can support a social dialogue and that, through this, can support the perception of a new sense of the place. The case study presented is an example in this direction of sustainable integration between services and tourist forms, among tourists and local society.

Key words: Relational tourism, social sustainability, alternative forms of tourism, services to the territory, tourist spaces

INTRODUCTION

Contemporary tourist space is configured as a vast set of attracting places, of services, of demand and supply, of local or global actions, of symbols and elements of authenticity, with places that appear and disappear with increasing speed and the tourist market looks for new dimensions, also inside territories apparently already explored.

Tourist phenomenon becomes more and more complex, with a superficial fruition of the places, tourist forms are proposed with the goal to give an experience conducted as a ready-made product communicated by the media. Tourist prefigures before the trip an idea on what will be both the aspect of the place to visit.

This complexity sets problems of environmental, economic and social sustainability.

The sustainability of tourist structures is often declared as useful for reaching certain tourist segments more careful to environmental issues, but it is not always real, especially there is a need to understand what is meant by the term sustainability, whether the protection of places, the search for resilience of the territory or the comparison with local societies.

This last declination of the sustainability is, particularly, the central theme of this paper.

Indeed, if the tourism is often a ready-made experience, then it favours the surrender of the individual to an apparatus that receives, protects and guide, it is not possible to meet the others: the tourist doesn't have occasions of meeting with the host society or this meeting is, once more, externally directed. Relationships born when a traveller, from the meeting with a local society and without previously defined mental maps, builds an equal relationship with the others.

The construction of an equal relationship is not sufficient to ensure the social sustainability of tourism forms: something is needed more because the tourist will not be barely tolerated, often cheated or exploited. It is important that tourism becomes an opportunity to build urbanity in tourist areas, providing services not only to the tourist but also to the host population.

THE CONTEMPORARY TOURIST SPACE AND ITS FORMS

The exploration of contemporary tourist space is difficult and faceted; there are perhaps many "tourism" how many tourists travel to various destinations¹. It is clear the need to refer to models that can describe in some way the complexity of the tourism phenomenon and the processes connected to it.

Contemporary tourist models, to which this paper refers, show on the one hand the need to discover new territories² increasingly vast, on the other hand a real implosion of the tourist space, with the concentration within closed or semi-enclosed areas of a series of pure, stylized, tourist images and landscapes³.

In the tourist processes of last fifty years it is possible to define two different currents: *modern* tourism and *post-modern* tourism.

1 Bernardi U., Filippi V. (2004), "Dal Turismo ai turismi: trasformazioni sociali e sfide culturali", in A. Savelli (a cura di) *Turismo, territorio, identità. Ricerche ed esperienze nell'area mediterranea*, Angeli, Milano.

2 van der Duim R., Caalders J. (2002), "Biodiversity and tourism, Impacts and Interventions", *Annals of Tourism Research*, Vol. 29, n. 3, pagg. 743-761; Minca C. (1996), "Lo spazio turistico postmoderno", in (AA.VV.) *Il viaggio – dal grand tour al turismo post-industriale*, Atti del Convegno Internazionale – Roma 5-6 dicembre 1996. Edizioni Magma – FLM Napoli; Minca C. (1996), *Spazi effimeri*, Cedam, Padova; La Rocca R.A. (2005), "Mass Tourism and Urban System: Some Suggestions to Manage the Impacts on the City", *E-Review of Tourism Research (eRTR)*, Vol. 3, n. 1; pagg. 8-17.

3 Augè M. (1993), *Non luoghi: introduzione ad una antropologia della surmodernità*, Milano, Elèuthera; Minca C. (1996), *Spazi effimeri*, Cedam, Padova; Best S., Kellner D. (1991), *Postmodern Theory*, Guilford, New York; Harvey D. (1993), *La crisi della modernità*, Il Saggiatore, Milano; Nuryanti W. (1996), "Heritage and Postmodern Tourism", *Annals of Tourism Research*, n. 23, pagg. 249-260.

Modern tourism⁴ is directed to the exploitation of distant places, but at the same time it transforms them and distills the essence of identity often to transform into icons or images for tourist use and consumption. Tourism is conceived as a separate entity from normal social activities⁵.

Post-modern tourist space instead defines itself as exhaustive, an ideal world apart, in which to live a concentration of images and icons of tourism and for this reason separated from the context, even physically⁶.

The dichotomy among modern and post-modern permits to understand the actual general cultural mutation and the tourist space always assumes an increasing importance both for the planning of the territory and for the local and social development.

Tourism influences and, often, determines some spatial processes and the observation of the tourist territory is essential to understand the mutations generated by it, like those becoming from post-modern tourism forms, which are proposed also like social projects⁷ and as such, reflect and often anticipate changes in society itself.

It is interesting to observe as the tourism reflects the contemporaneity, on one hand it pursues tight spaces, true atopic territorial "enclaves"⁸, but on the other one it goes in search of deeper meanings, such as the need to know in a better way the places and to compare itself with local societies⁹.

The sustainability of tourism forms is largely linked to economic policies¹⁰ but is also expressed in terms of environmental compatibility dwelling too long on reductive visions not considered absolutely satisfactory like that of the tourism exclusively concerned with natural processes or it is just as often confused with the alternative tourism than the traditional one.

A case study of the reduction of tourism to an economic policy is represented by Sardinia: prevailing views in tourism policies are always directed exclusively to receptivity and to the establishment of new structures, focusing on "typicality" of the places and on forms of advertising, marketing, endorsed repeated models

4 Minca C. (1996), *Spazi effimeri*, Cedam, Padova

5 Mustonen P. (2006), *Postmodern Tourism – Alternative Approaches*, Publications of the Turku School of Economics and Business Administration, Series A- 2:2006.

6 Minca C. (1996), *Spazi effimeri*, Cedam, Padova; Ritzer G. (1997), *Il mondo alla McDonald's*, Il Mulino, Bologna; Ritzer, G., A. Liska. (1997), "McDonaldization" and "Post-Tourism": Complementary Perspectives on Contemporary Tourism", in *Touring Cultures: Transformations of Travel and Theory*. C. Rojek and J. Urry, eds., Routledge: London; Mustonen P. (2006), *Postmodern Tourism – Alternative Approaches*, Publications of the Turku School of Economics and Business Administration, Series A- 2:2006.

7 Raffestin C. (1986), *Nature et culture du lieu touristique*, *Mediterranee* 58,3, Marseille.

8 Judd D. R. (2003), "Visitors and the Spatial Ecology of the City" in (a cura di) Hoffman L. M., Fainstein S., Judd D. R. *Cities and Visitors: Regulating People, Markets, and City Space*, Wiley-Blackwell; Edensor T. (1998), *Tourists at the Taj. Performance and Meaning at a Symbolic Site*, Routledge, New York; Hannigan J. (1998), *Fantasy City: Pleasure and Profit in the Postmodern Metropolis*, London and New York: Routledge.

9 Noy C. (2004), "This Trip Really Changed Me. Backpackers' Narratives of Self-Change", *Annals of Tourism Research*, Vol. 31, n. 1, pagg. 78–102.

10 Nijkamp P., Verdonkshot S. (1995), "Sustainable Tourism Development: a case study in Lesbos", in (a cura di) Cocossis H., Nijkamp P. *Sustainable Tourism Development*, pagg. 127-140, Avebury, London; Garrod B, Fyall A. (1998), "Beyond the rhetoric of sustainable tourism?" *Tourism Management* 19 (3), pagg. 199–212; Lew A.A., Hall C.M. (1998), "The geography of sustainable tourism: Lessons and prospects". In C.M. Hall e A.A. Lew (eds) *Sustainable Tourism. A Geographical Perspective* (pagg 99–203), Harlow: Addison Wesley Longman; World Tourism Organization (1999), *Codice mondiale di etica del turismo*; Mair H., Reid D., George W., Taylor J. (2001), "Planning for growth? Re-thinking the rural tourism opportunity", in *Canadian Society of Extension*; Pigliaru F. (2002), "Economia del turismo: crescita, qualità ambientale e sostenibilità", in (a cura di) R. Paci e S. Usai *L'ultima spiaggia*, Cuec, Cagliari; Briassoulis H. (2002), "Sustainable tourism and the question of the commons", *Annals of Tourism Research*, Vol 29, N. 4, pagg. 1065-1085; Liu Z. (2003), "Sustainable Tourism Development: A Critique" in *Journal of Sustainable Tourism* Vol. 11, n. 6; Ko T.G. (2005), "Development of a tourism sustainability assessment procedure: a conceptual approach", in *Tourism Management*, vol. 26, pagg. 431–445.

such as bed and breakfasts, hotels tout court, tourist residences, diffused hotels and so on. Example of this is that in the villages, both coastal resorts and more internal, the number of these structures is increasing more and more¹¹. Sardinian context therefore focus almost exclusively to the objects centre of tourism, what hotels, resort, B&B etcetera, without considering in any way impacts on the territory. What appears is a perseverant vision of the territory as object of tourist politics few farsighted, but above all directed to the creation of extraordinary spaces, without any relation and temporally limited. There is the creation of extraordinary and non-relational spaces in which the tourist recognize only in a superficial way local host societies, forming and undoing aleatory relationships. The temporal factor deserves nevertheless a further reasoning. The places are seen immovable in the time, as if they were immune from the effects that the tourist flows produce on the territory. The politics fully respond to the characters of what could be considered an ideology that proposes the territory in symbolic form, reviving the archetypes and proposing them to the tourist flows, often with few elaborations. The process of evolution of the tourist phenomenon during the years has set the accent on the characteristics of the receptive resource rather than on the places and on the territories. When the discourse has shifted, over time, also on the territories, it is tried to give prominence to the ethnocentrism, repeating the same shapes and models and not, and quite as it should be, for a complete planning system. This cultural path can be defined as a tourism ideology.

It is useful to try to represent the tourist path in Sardinia by a modeling tree.



Figure 1: The path of tourist ideology

The graph shows the continuous generation of new forms, including through the reinterpretation of existing ones, but what effects has had on the territory this continuous and faceted development?

Nevertheless it can be understood however an important factor: the concomitant development of the Costa Smeralda, of the tourist villages and of the coastal villages; the birth of the Consorzio Costa Smeralda has influenced the development of tourism politics so much that has inspired new forms in existing tourist resorts, as it has influenced the development of pre-existing coastal settlements¹², with a strong intervention of construction, almost exclusively along the coasts; with effects not too different among them.

In holiday villages, and especially on the Costa Smeralda, the construction of exotic and imaginary Sardinia is realized, destined to a national and international tourism, but however contained within of the spatial limits and with an eye of respect to the territorial context; vice versa in the coastal villages, grown up without a coherent urban planning, simulacra them same of the simulacra Costa Smeralda, the quality of the environment has not been observed and has been delegated to the sensitivities of individuals.

11 Facoltà di Architettura di Alghero (2008), *Terzo rapporto sul turismo ad Alghero - Stagione 2007*. Available from: <http://atoss.lampnet.org/article/articleview/18/1/2/> [accessed on: 1 september 2009] In Sardinia, the hotel industry has a significant number of 3 star hotels (371), but also an interesting number of 2 star (120) or 4 stars (174). There are few, overall 5 star hotels (18) and very few, considering especially the high number of second homes on the island, the residence hotels (84). Vice versa a continuous growth of the B&Bs is observed (in 2006 they were 1033), of campings and of tourist villages (98 totally). Overall, a clear predominance of B&Bs is observed on all on all the other tourist structures.

12 Serreli S. (2004), *Dimensioni plurali della città ambientale. Prospettive d'integrazione ambientale nel progetto del territorio*, Franco Angeli, Milano.

However, tourist and coastal villages can not be said communities, as subject to seasonal flows. Sardinia's coastal landscape, in time, has seen the development of two almost antithetical processes, sometimes antagonist between them: on the one side there were receptive forms dedicated to tourists, with exclusive accommodation in costs and terms of acceptance, on the other one there was an increase of villages exclusively dedicated for local societies.

Exclusive residences against second houses, and for about thirty years, from the sixties to the nineties of last century, this was the prevailing tourism policy, also with episodes of gentrification.

Tourist ideology pervades the planning of the activities, promoting the degeneration in adopting general models and conforming accordingly the reality, investing in stylized local policies. It triggers a process of de-territorialization that gradually crystallizes the signs and the forms of the territory and the culture. The territory becomes touristic¹³, rethinking itself in its own image.

THE TOURIST ONTOLOGY: THE SOCIAL SUSTAINABILITY OF SPACES AND FORMS

The interaction between tourists and host societies is commonly founded on some mystifications.

Firstly that the tourists represent some homogeneous groups cohesive in "to be" tourists and in "to do" tourism. Secondly that host societies see the tourists like perfect strangers. Thirdly, visited places are homogeneous.

Tourists may, if it is possible, strictly interact with host societies to dissolve the myths and stereotypes generated by both parties.

The risk is that each one of the two actors of the tourism confines himself in his own "specialized" enclave.

It is possible to say that when the visitor confronts himself with a tourist territory, he has the same approach that he has with an object, i.e. he compares it with something else ever known or experienced so it is simple to better define it¹⁴. It is defined, then, a previously considered and evaluated subject. The territory and the host society are therefore treated as mere objects: in which cases they become subjects?

Now it is necessary to distinguish among a tourist "experience" and hospitality "relationship", piercing the surface of tourist ideology, based on non-relational spaces and temporally limited.

The relationship with an object is always based on something that has already been reduced to a scheme-type, while the relationship with another person comes from the comparison, the relationship is immediate, without the provision of concepts, images or fantasies. Each one is, for the others, pure presence as the action is done "now", in present time¹⁵.

But experience does not happens in a present time, draws strength from its past, as it is anticipated by preconceptions that are inherent in everyone. It is not possible to have a pure presence, but a previously judged and evaluated object.

Applying this reasoning to tourism it can be inferred that a truly sustainable tourism under the social profile favours the relationships between tourist and host societies by I-Thou type, then relationship between subjects.

Tourism forms careful to the subjects, to the people rather than to the individuals and oriented to the building of "relationships" between the 'I'; the 'other' can be defined relational.

True sustainability comes from the interpretation of travel as knowledge, on experiential exchange

13 Minca C. (1996), "Lo spazio turistico postmoderno", in (AA.VV.) *Il viaggio – dal grand tour al turismo post-industriale*, Atti del Convegno Internazionale – Roma 5-6 dicembre 1996. Edizioni Magma – FLM Napoli. Minca C. (1996), *Spazi effimeri*, Cedam, Padova.

14 Martins Cipolla C. (2004), "Tourist or guest: designing tourism experiences or hospitality relations?", *Design philosophy papers*, n. 2.

15 Buber M. (1921), *I and Thou*, Heidelberg: Lambert Schneider, 1974.

based on the meeting with the otherness. In this case is essential the perception of authenticity and the possibility to share concrete experiences¹⁶. Socially sustainable tourism forms are restyled ones elaborated beginning from relationship, passing from the "ephemeral tourism" and the territories shown and treated as an aesthetic object of *immediate consumption*¹⁷ at the "concrete tourism", hospitable and re-creators of urbanity.

The re-generation of the tourist context can bear in the suburbs of the traditional tourist areas, in low density areas addressed not only to tourists but also to those who live there.

The place of tourism then can become the place of living.

This requires a change of cultural paradigm oriented to participatory processes that can play an important role in environmental politics, personal services and welfare¹⁸.

The problem is how to find tourist forms able to favour an equal relationship with the otherness; this means to understand what are the conditions under which a person is generally prepared by interaction with others.

Environmental and cognitive psychology studies show that these conditions are created when a person is vulnerable or is in particular conditions to feel mostly inclinable to the contact with the others.

The conditions are created when the two parties are each other "vulnerable", where for vulnerability it is intended the possibility to feel "touched" for something or someone, a possibility to feel common, as opposed to the invulnerability that the tourism generally creates, or indifference to the contexts and the local societies. The vulnerability between tourists and between tourists and local society born when it creates a bond due to a particular condition of necessity or need. To realize vulnerability conditions means then to identify what can be the requisite to generate a contact between the parts¹⁹. It is necessary to think what can be the way for which a tourist experience doesn't hinder the birth of unexpected relationships.

ALTERNATIVE FORMS OF SOCIAL SUSTAINABLE TOURISM: AN EXAMPLE OF RELATIONAL TOURISM IN SARDINIA

Sardinia offers an interesting field of research to study the evolution of tourism policies, particularly with respect to relations between tourists and local society.

What is at the base of this paper is the possibility to find a new *possible* tourism form, that can be defined relational: for this it is necessary to explore, between the tourism forms oriented to relationship, those that favour a social dialogue and through this encourage the perception of a new sense of place.

Then find forms of tourism "inclusive" that contrast the "exclusive" typical of the forms produced by the tourist ideology.

These forms are contemplated in what is generally considered "social tourism"²⁰, i.e. the set of tourism

16 Gatti F. e Puggelli F. R. (2006), *Nuove frontiere nel turismo. Postmodernismo, psicologia ambientale e nuove tecnologia*, Hoepli, Milano.

17 Assunto R. (1960), *Introduzione alla critica del paesaggio*, in "De Homine", 5-6, pagg. 252-279. Venturi Ferriolo M. (2002), *Etiche del paesaggio*, Editori Riuniti, Roma

18 Salomone M. (2005), *Strategie educative per la sostenibilità*, CELSB, Bergamo.

19 Martins Cipolla C. (2004), "Tourist or guest: designing tourism experiences or hospitality relations?", *Design philosophy papers*, n. 2.

20 Lanquar R. e Raynouard Y. (1986), *Le Tourisme Social*, Paris: Presses Universitaires de France ; Cohen E. (1989), "Alternative tourism – A Critique", in: Singh, T.V., Theuns, H.L. & Go, F.M. (eds). *Towards Appropriate Tourism: The Case of Developing Countries*. Frankfurt, Peter Lang, pp. 127-142. Romeril M. (1994), "Alternative tourism: the real tourism alternative?" in: Cooper C. e Lockwood A. (eds), *Progress in Tourism Recreation and Hospitality Management*. Vol 6, Chichester: Wiley, pp. 22-29. Chauvin J. (2002), *Le tourisme social et associatif en France*, Paris: l'Harmattan. McGehee N.G. (2002), «Alternative Tourism and Social Movement Participation.» *Annals of Tourism Research*, 29:1, 124-143. McGehee N.G.; Norman W.C. (2002), "Alternative Tourism as Impetus for Consciousness-Raising." *Tourism Analysis*, 6:3/4, 239-251. Minnaert L. (2007), "Social

activities that can respond to a request for relationality and is not directed only to specific social tourist categories of persons in situations of disadvantage.

The social tourism is essentially founded on a key word, that is service, intended both for tourists and local society; these are services useful for the tourist as they can make more shared their experiences in the visited places and more pleasant the permanence in places generally few known or less served; to the resident in which permit to enjoy of performances of quality without having to look elsewhere.

In order to represent a relationship between the two entities of the process is necessary to identify what form of service can be activated, in the way that the tourist lives experiences in the same places and in the same times of the local societies, living the everyday, and not assisting to representations.

An alternative form of ontological and relational tourism needs these requirements:

- it appears as a discontinuity with the usual forms of tourism;
- it shapes as a *not predestined and externally directed tourist form*, but it regenerates thanks to the constant possibility to create optimal conditions to the mutual vulnerability among guest and host;
- it allows to *overrun the typical individualisation* of tourist villages and resorts in general;
- it provides *functions and services related to housing* to improve the quality of life of the host territories and territorial equity.

A contest where the services and the functions can be declined in this way is tourism related to personal care. People's life takes place through sequences of actions, circumstances, places, that, for various reasons, they allow the daily meeting of different functions. The whole of these contexts and of these functions is everyday life, the forms of living that it develops and thus the practices of production, use and consumption on which it finds everyday life.

On the other hand, given their everyday character, these practices are often routine actions: they happen for habit beginning from motivations that almost appear unaware to those who stay in one place, while on the other hand, they may seem extraordinary, new, authentic, for those who visit.

One of the daily practices is the usual self-care, personal care and the tourism market also offers the eventuality of being able to take care of itself during the holidays, just think about SPA tourism, which represents a model case the area of the Dead Sea²¹, to the form of the "protected tourism"²² i.e. when the tourism is set to disabled or elderly, to the "dental tourism"²³ that pushes more and more tourists to countries like Croatia, Romania and the Netherlands in which the dental treatment are more economic than elsewhere.

However, there is a problem, i.e. this tourist forms, although new and alternative, do not consider in any way relationship with the local society.

The case study, however, is directed to the identification of a form in which personal care service is open to the context, and that implies then a systemic discontinuity in relation to forms listed above.

Anyone who has had the experience of a medical waiting room knows that can develop two attitudes: fear towards the others and personal choice to close in readings or thoughts, or curiosity about the others, desire for knowledge and sharing. The sharing of pain is an essential in the interiorization of an event that has caused suffering²⁴.

This is not to seek pain in tourism forms, but the decision to use health care, as a tool to undermine the principles of tourism ideology, arises precisely from the assumption that tourist relations, relations tourism: a potential policy to reduce social exclusion? The effects of visitor-related social tourism for low income groups on personal and family development", paper presented at the 39th Annual UTSG Conference, 03 - 05 Jan 2007, Harrogate.

21 http://it.visitjordan.com/visitjordan_it/Principaliattrazioni/MarMorto/tabid/67/Default.aspx

22 <http://www.animanziani.it/Turismo%20protetto.htm>; http://www.isoleverginiusa.it/info_servizi.htm

23 <http://www.pocacola.com/2007/10/02/la-nuova-frontiera-il-turismo-odontoiatrico/>;

<http://www.odontotecnici.net/news/2006/097articolo2006.htm>; <http://www.turismodontoiatrico.it/>

24 "If where there is pain there is humanity, then as greater is the ability to feel pain, as greater is the social capability... the attention to other people's suffering and to the common suffering measures the humanity or the inhumanity of the existence itself"; Riva F. (2003), *Dialogo e libertà. Etica, democrazia e socialità*, Città Aperta, Enna.

that are created during the sharing of medical experience are often very durable, as born in moments of particular need.

An example of a similar type of tourism is identified in the project proposal that has won the Landscape Award banished by the Autonomous Region of Sardinia in 2008, in category H: interventions for landscape planning of wide urban or extra urban areas²⁵.

The territory of Osilo (Sassari) has an interesting and unique example of industrial architecture, represented by the system of 36 water mills located in the valley of the San Lorenzo River. Within the valley, in addition to the system of mills, there is a settlement system (about 187 inhabitants) that consists in the village of San Lorenzo a Monte, compact nucleus where live most of the inhabitants, with houses scattered along the river, some of which are represented by the mills, and finally from the village of San Lorenzo a Valle and Pirastredu.

The project proposal intends to show that the landscape is a component of the identity and this remains so in spite it brings inside a tourist component.

The project is oriented towards a relational tourism, not only to recover part of the building stock, of which the greatest part has been turned in homes for residence or for irregular use in the weekend or in the summer, to the river setup and the regeneration of the rural historical landscape, creating the conditions for new tourist forms within a context of wider use.

The recognition of the valley as "deceleration space" directs the study to functions related to the welfare and to the mental and physical health through water, through the realization of public-private functions related to health tourism.

The element that can trigger the process can be represented by a spa built in an abandoned mill in the middle of the valley. Another mill, more isolated in the narrowest part of the valley, can accommodate a residence and treatment centre dedicated to people with disabilities, for whom the therapeutic qualities of water and related activities may be useful. The spa and the centre are served by a receptive structure, organized according to the typology of the diffused hotel or guesthouses with the construction of 16 residences where tourists can stay up to 50, with an adjoining structure destined to restoration which has a capacity of up to 60 seats, favouring, however the reception of the disabled who use services and the families or companions so as to provide rare service.

It is necessary to think in different ways, passing from private tourist areas in semi-public spaces, with small-scale initiatives that produce effects in large scale, thus providing service functions and services related to housing affordable to those who are not tourists, therefore enjoyable not only by the tourists, but also by who lives daily tourist space.

The tourist form is set as a *discontinuity respect the usual tourist forms*, the opening of the health-care centre to local societies, and not only to the tourists, can allow the meeting and the comparison, generally precluded in tourist areas, thanks even at small places.

The tourist structure is configured as a *not preordained tourist form*, but it regenerates itself thanks to the constant ability to create optimal conditions for mutual vulnerability between guest and host, allowing the generation of a cohesive social fabric, allowing *the overcoming of typical individualization* of tourist villages and resorts in general.

Tourism and welfare, tourism and personal care are more than valid reasons for a tourist to make a choice of travel.

To unite the search for self-care and the pursuit of happiness with the opportunity to make an experience of sociality in a different context permits to open very interesting scenarios.

First, the generation of new relationships. The relationship between people coming from different places and cultures allows the establishment of a new social contest. In a time of great fragmentation, national

²⁵ Project Team: Francesco Spanedda, Paola Pittaluga, Martino Marini, Giuseppe Onni, Vlatka Colic, Gianluca Melis, Antonio Serra, Paolo Vargiu, Roberto Serra

and international social tensions, of a severe economic crisis, contact and engage with the otherness, someone different from us, is highly desirable.

The relationship between tourists and local society is an important moment in tourism process, and we have seen that if it is mismanaged can cause extensive damage to both one and to others. It is for this that an alternative tourism form must seek to favour social contact. The territory and the tourist space are directly affected by this comparison, which must be direct, without intervention and not externally directed, to re-build the processes of urbanity.

San Lorenzo Valley is thus a singular case. To produce urban processes in spaces destined to tourist forms driven by the tourist ideology, changes the way to perceive and to live the tourist spaces, above all those with low population density.

Tourist form has again a real importance on low density contexts, generally marginal and with few services. The few presents don't guarantee the same conditions of urbanity of the most densely populated territories. Then it starts a vicious cycle that leads to depopulation, which in turn affect the quality and quantity of services offered. To reason only on the tourism as form of economy in this type of territories, like sardinian ones - the same reasoning is valid in areas most densely populated but very poor and underdeveloped - only requires always new hotels or resorts, while thinking about tourism as an opportunity to provide services for tourists and local society, means not only to intervene on the tourist but also generate positive effects on the host territory and improve their quality of life. Having a service in low density areas such as health and personal care means to allow to whom that live in those places to ensure easier access to goods which may be disposed only at considerable distances. It means, therefore, to build urbanity, to increase the opportunities and the quality of the life to reach a territorial equity.

It means also to produce a new sense of the place: on the one hand, thanks to the possibility of having a quality service, the local society is forced to look elsewhere for their own welfare and takes ownership of their sites, on the other the tourist finds that existential authenticity, base in travel motivations. It obtains simultaneously an appropriating and re-appropriation of places by the two subjects of tourism, on a shared space. It also produces a new place, and space tourism ceases to be regarded as deterritorialized. It is not therefore essential to pursue the tourist market, but rather choose to work on people as true stakeholders in tourism process, on the possibility that compares us in an equal way, on the possibility to share a sense of belonging to something that is not a limited time experience but a lasting trace in everyday life.

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Cultural and International Tourism

CULTURE - BASED TOURISM CLUSTER. THE CASE OF THESSALONIKI

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Abstract

At the end of the XX century globalization gained more strength regarding to a fast development of the information technologies and the competition on the world market impressively scaled up. The issues of developing knowledge-based localization accordingly became the main point responding the needs of the open global market in order to avoid its threats and to use its opportunities substantially.

This paper evaluates the potential of the culturally reach urban territories like Thessaloniki to find niches in the global market and to promote their local economic development founded on the culture-based tourism cluster capabilities. The paper addresses three main issues: (1) the need of innovation, the social capital and the networking behavior as the tourism cluster key; (2) the need for the improvement of the inputs utilization in order to maximize the advantages of the place and for getting the highest value added in terms of income & other types of benefits, and (3) the importance of developing culture-based tourism products and the cluster strategy.

The paper will present the case study of Thessaloniki culture-based tourist clusters. We'll try to outline briefly the Porter's diamond model of competition, discussing the advantage of the cultural heritage, the networking behavior of the tourism cluster's main stakeholders, the attitude of Industry and Academia towards government competences, the needs of the support tools, the infrastructure and the service condition in order to develop the tourist friendly environment of the place.

Our research will be mainly based on the results of the fieldwork and the interviews taken from the cluster stakeholders (industry – tour and travel agencies, other tourism companies; local government – Prefecture and regional development authorities in charge of tourism affair and academia – the universities, institutes and other educational institutions), conducted specially for this paper. Besides the interviews we will refer to the official statistics of Greece, promotional materials of the city of Thessaloniki and the region as well as the tourism development policies general scientific research.

The paper will discuss some factors of Thessaloniki tourism-based cluster competitiveness. We'll use here SWOT analyses presented in the Descartes coordinate system that gives better visualization of the competitiveness and networking factors weight.

The conclusion will try to summarize main findings of the research: (1) the needs of the Thessaloniki culture-based tourism cluster development (2) the problems that require solving in time to promote networking process among the main stakeholders of the cluster, (3) the need of the leader identification and the common vision to develop culture-based tourism strategy.

Key words: Culture- based clusters; tourism; networking; competitiveness of the place.

INTRODUCTION

At the end of the twentieth century terms of globalization and localization became very popular in the world economic development discussion. New information technologies, developed transportation systems, open national borders and other new drives of the world economy have changed a lot in the arena

of a worldwide competition. Step by step the weight of competition moved from a national to a regional level and the localization got more importance. It is the common point of view that the global economy at the moment is led by the regions which have very strong competitive cluster-based economies.

All the smart local economies try to find their niche based on their competitive advantages in the global market. Developing cluster they try to identify the field of economy in which they have competitive and sustainable growing potential. For a number of countries with outstanding history and culture it could be the tourism sector. But the regional tourism development potential should be carefully considered. The unique cultural and historical attractions' characteristics need right consideration to build a place competitiveness promoting strategy on.

In this paper we mainly evaluate the case of Thessaloniki, briefly presenting its tourism potential and some gaps that lag behind the sector development.

The chapter of methodology presents the diamond competition model developed by Michel Porter and the short review of the interviews as a research tool for Thessaloniki competitiveness SWOT analysis.

The next chapter discusses the case of Thessaloniki culture-based tourism cluster according to the Porter's diamond model and SWOT analyses based on the fieldwork results.

The conclusion, ending chapter will bring a short review of the research results, brief recommendations supporting the cluster development and the improvement of the place networking culture.

THEORETICAL AND METHODOLOGICAL APPROACH

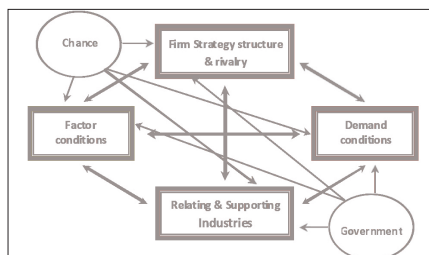
Fast growing globalization process and new economy fields have actualized more sophisticated competition rules of the modern world market. The notion of comparative advantages implemented a new term of competitive advantages and the cluster theory became the top issue of the research agenda, bringing a new understanding dimension of the local economic development and its role in an added value chain and a social capital creation (Porter 1995, 1998, 2000).

A cluster, "geographic concentration of interconnected companies and institutions in particular field" (Porter 1998, 78), brings competitive advantages concentrated more in the local knowledge, motivation and relations, hard to be reaches or copied by other competitors. According to Porter it promotes the improvement of productivity through a continual innovation.

Developing sectors characterized by the various and unlocked clusters are depended on the local resources and the potential local stakeholders owe.

In his Diamond model Porter clearly presents the angles of competition (see chart 1). The paper doesn't discuss the model as a tool, but uses it on the culture-based tourism cluster in Thessaloniki, considering that this issue can be found in lots of scientific reviews (Martin and Sunlay 2003; Nair, Ahlstrom, and Filer 2007).

Chart 1. Diamond model of Competition



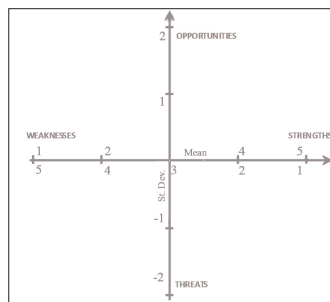
Despite a number of studies dedicated to the tourism development issues in Greece and official statistical data, there is lack of information concerning networking behavior in the field. Studying the Thessaloniki case we came to the conclusion that interviewing the field representatives was the only method to draw the appropriate picture of our concern.

We identified three main stakeholders Private-Academia-Government¹ (Etzkowitz 2002) and studied their attitude towards tourism development in Thessaloniki.

Interviews with educational and private sectors capture three main directions: (1) The attitudes of the companies towards some internal factors of competitiveness; (2) stakeholders informal/formal networking; 3) The attitudes of Industry and the education sector towards competences of the government. The questionnaires of the interviews were mainly based on Jackson's and Murphy's Australian regions tourism clusters research (2006).

The mean and the standard deviation of each question was calculated due to the interview results and were presented in the format of the SWOT analyses on the Cartesian coordinate system, putting on the horizontal axis weakness and strength and on the vertical axis threats and opportunities (see chart 2).

Chart 2. SWOT analysis of competitiveness



Besides the strong points the interviews also clarify some limitations: the populations of the target groups were not vast enough to avoid little influence of some answers, caused in several cases due to the careless answers of the respondents. I consider that the method of presenting the interview results in the format SWOT analyses founded on the Cartesian coordinate system² is also new and needs further development.

CULTURE-BASED TOURISM CLUSTER OF THESSALONIKI

The competitiveness of Thessaloniki Culture-based tourism cluster is well depicted on the Porters' diamond model presented below (see chart 3).

¹ Interview covers: Local government (Prefectural committee for the promotion of tourism; Region of Central Macedonia managing authority –Operational Programme for Central Macedonia), educational institutions (Alexander Technological Educational Institute /ATEI/ of Thessaloniki, Department of Tourism Management; Organization of Tourism Education and Training /O.T.E.K./) and private tourism companies (Travel agencies, Tour operators, airline company, convention and event organizer).

² This method was initiated by Polish expert, Janusz Szewczuk in the policy paper - "Local Economic Development Plan for Tbilisi Municipality, 2007".

Factor condition

Thessaloniki is one of the best locations in Europe holding the huge natural and built in resources for culture-based tourism cluster development. The place's cultural heritage of the millennia, the environment and the people turn to be very interesting attractions to explore.

The memory of the city dates back to 315 BC, since its foundation by the king Cassander, but before it was populated as late as 6 thousand BC (Zafiris 1997). Thessaloniki, built at very strategic location in the thermal gulf of Mediterranean sea, was playing an important historical role as the region's capital city as well as the main social-economic and political hub connecting Europe and Asia. The region is proud of its cultural and historical ownership:

- 1) Alexander the great and his influence on the globe clearly represent the scale of the Hellenic culture dominance. The City of Pella and its Museum are really wonderful cultural attractions to explore the ancient Greece ruled by the great governors.
- 2) The Philosophy school born in the region is one of the world's biggest treasures. Aristotle and his school developed a new dimension of thinking and gave birth to numerous bases of the science.
- 3) Greek mythology very clearly captures ancient Hellenic life pace, beliefs and memory of many other nations.
- 4) The place is also very important with its old Christian roots, Byzantine culture and history. Mount Athos - "The Garden of the Virgin Mary", Holy Mount located on the most beautiful eastern peninsula of Chalkidiki, is entirely dedicated to prayers and the worship of God in Greece, is one of the most holy places for orthodox Christians to pray. Mt Athos is divided into twelve self-governing territories with cardinal monasteries on each and is populated only by monks; and Meteora – a complex of monasteries Built on rock mountains, creating a magnificent spirit of the Greek Monastic church as well; many other single Orthodox Christian monasteries and churches built all over the place create very pleasant feeling of a spiritual life of the place grown since the first bases of Christianity.
- 5) The city has a considerable heritage of Ottoman culture as well; number of cultural monuments clearly reflects Ottoman rulers' time in the city.

Having one of the best geographic positions, Thessaloniki has counted lots of wars and hard times under invaders rule, but survived and now the whole city is a large open museum ready to explore. The old and the change are well depicted through plenty of historical sites and monuments of the city: Romans Forum; Triumphal Arch of Galerius, Rotunda, St. Demetrius Church, city wall, White Tower, many open archeological sites and cultural places. Therefore, a number of museums, cinemas, theatres and other cultural-entertainment establishments (festivals, Open Air concerts, Religious and other city celebrations) reflect high taste of the local art.

In a few hours distance from the city center of Thessaloniki one can really get unforgettable memories of the places of Greek pride and spirit. Mount Athos, Meteora, Pella, Mount Olympus, cave located school of Aristotle and fascinating beaches of Chalkidiki are the places that can boast of about its beauty, ancient history, culture, religion and philosophy. Everyone who explores these gorgeous dots of Greek culture and many other attractions according to the particular taste and interest gets satisfaction.

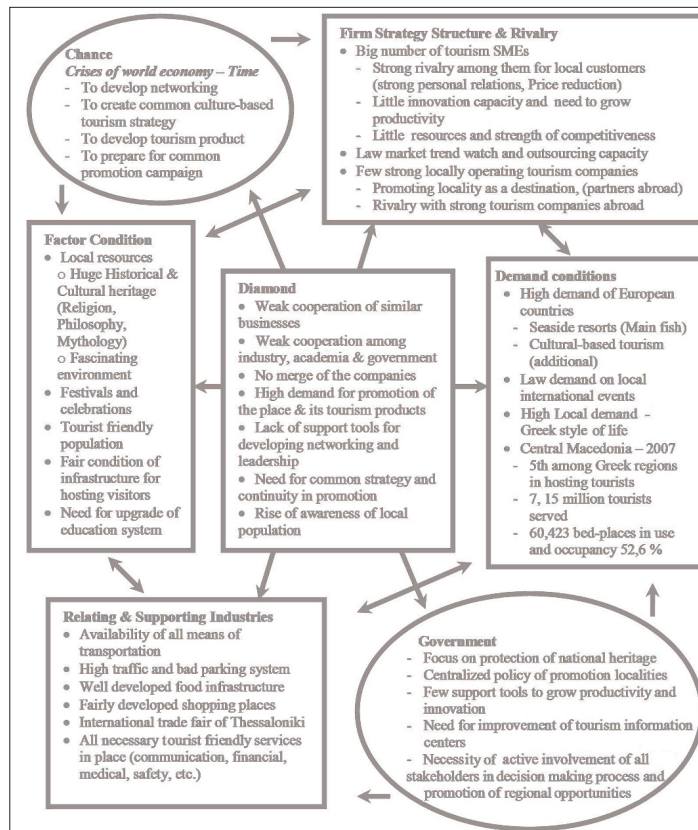
The Population of Thessaloniki is quite friendly with tourists. Most of the young population speak English and are glad to support tourists to satisfy their curiosity. Middle aged and the older population are less speaking English, but understand basic of it and are supportive as well.

According to the representatives of tourism industry most of the labor force in is not trained well enough to meet the standards of services properly and there is the tendency to employ nonresidents as the source of cheap labor, which are mostly not appropriately aware of Greek traditions and culture. Standard of the service is generally not high enough. Most of tourist companies represent small and medium firms.

There are only two Tourism Education institutions in the place: ATEL of Thessaloniki - the main tourism educator in the region of Central Macedonia with undergraduate studies, the only institution having

potential to carry research concerning local tourism affairs; and OTEK with school of guides, carrier office and training course for practitioners. The rest of educational institutions are not specialized in providing tourism studies.

Chart 3. Diamond model of competition of culture-based tourism cluster in Thessaloniki



The city owns great variety of Accommodations: hostels and other furnished apartments providing different qualities of services. There is directory of hotels made by Thessaloniki Hotel Association. It presents a review of the services the hotel offers, their star rating and contact information. Out of 76 hotels listed in the directory ten are given five stars (LUX Cat.), sixteen - four stars (A' Cat.), twenty-five - three stars (B' Cat.), twenty-five - two (D' Cat.) and single stars (C' Cat.). In total all the hotels present 5662 rooms, out of which 2899 - "LUX" & "A" category (see table 1). Some international brands are recognized among high rating hotels as well: "Holliday Inn", "Hyatt", "Kampinski", "Ambassador" & other. These hotels own all the facilities for hosting conventions and different types of events, creating wonderful opportunities making Thessaloniki an attractive destination for business visitors.

Table 1. Number of hotels and rooms provided by rating in Thessaloniki

RATING (Category)	NUMBER OF HOTELS	NUMBER OF ROOMS
***** (LUX)	10	1509
**** (A')	16	1390
*** (B')	25	1781
** (C')	11	584
* (D')	14	398
TOTAL	76	5662

Source: Thessaloniki Hotel Directory

Lack of high standard tourist information centers is really disadvantageous for the tourism development of the city. There are only two of them: One at the airport which unfortunately provides almost no information for tourists, providing only brochures how to get to the city by bus and some maps. But it is not open at any time. The other is in the city center. This is a bit better tourist information center, but again, they only provide general information and maps about the city and have much more promotional materials of other places of the country rather than Thessaloniki. They have no quality guidebooks or the information about services and offers of private tour operators or travel agencies of Thessaloniki. By their guidance one can get only some specific information of accommodation by the hotel directory we've mentioned above. There is no multimedia presentation, or other means to search for specific tourist opportunities. This tourism information center has very little again general information on its web page, no specific details of Thessaloniki culture-based attractions about the city and its surrounding.

Really significant is the fact that the city infrastructure, touristic signs, city maps, names of the streets have English definitions. But there is lack of improved tourism publications and it is difficult to find good tourism guidebook of Thessaloniki.

The web provides very poor information concerning Thessaloniki and the existing portals or the websites don't offer all pooled together tourist opportunities, including special packages for Culture-based products.

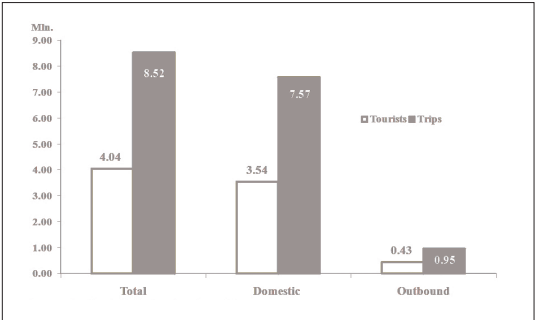
To find proper information of tourist offer one should search it through the web-pages of some private companies (travel agencies or tour operators), but here he will face difficulties as most of the sites are under construction, mainly in Greek language and few in English offering general information and no special price offers. Online booking of services is almost unavailable. Though some strong companies have this opportunity most of them have started to obtain it just at the moment. The local stakeholders use very little of the internet or other new IT to develop and promote local tourism opportunities, when one of the main instruments of selling touristic offers is the source of World Wide Web.

Demand condition

Local demand on tourist products is an important seed to develop sophisticated tourist offers. Greek population really appreciates luxury of rest and entertainment. Short working days and plenty of holidays around a year create wonderful opportunities to develop more sophisticated tourism demand in the local population.

In 2007 4.04 million Greek resident tourists made more than 8.52 million 4 days' and even longer visits, 430 thousand of which traveled abroad for almost a million visits (see chart 4).

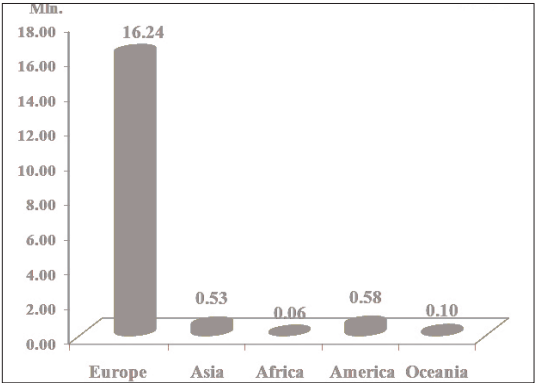
Chart 4. Number of Greek resident tourists and their trips on holidays in 2007 (4 plus nights)



Source: National statistical service of Greece

Foreign visitors demand concerns mainly the seaside resorts and culture-based products are only touristic offers' additional attractions. In 2007 approximately 17,5 million tourists visited Greece, most of whom were from Europe 92,7 % - 16,24 mln. (see chart 5).

Chart 5. Foreigners arriving in Greece classified by citizenship

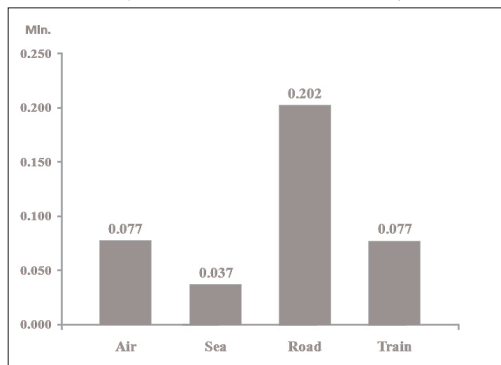


Source: National statistical service of Greece

The region of Central Macedonia³ holds the fifth position in the number of tourists, comparing to the other regions of Greece. In 2007 393 thousands of foreigners visited the region and spent more than 4.15 million nights. In Total the region hosted 7.15 million tourists, 3,59 million of whom were Greek residents. The same year Central Macedonia had 60,423 bed-places in use and their occupation was only 52,6%, that showed the capacity of the place to host almost twice more visitors by its accommodation facilities (see chart 6;7;8).

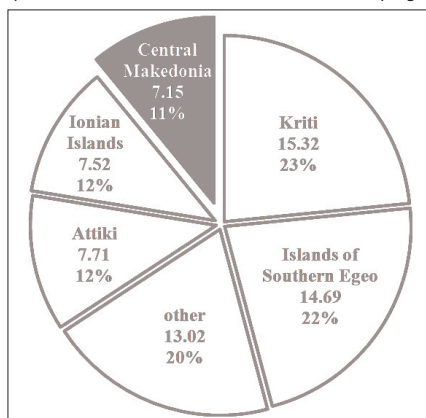
³ The most touristic indices were calculated for Greece in total or by the regions, so in the statistical analysis we will often refer to the region of Central Macedonia Instead of Thessaloniki.

Chart 6.Foreigners first arriving in Central Macedonia classified by means of transport in 2007



Source: National statistical service of Greece

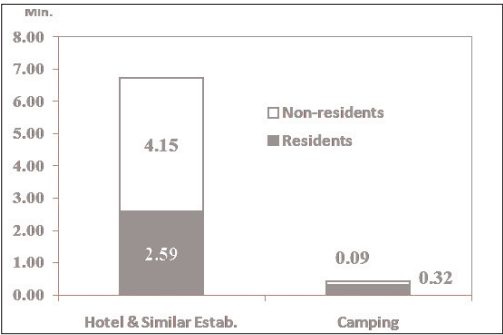
Chart 7. Nights spent at hotels, similar establishments and camping by region in 2007



Source: National statistical service of Greece

The biggest touristic attraction in the region is a seasonal seaside resort at Chalkidiki, active only for summer period. Other cultural products are not so intensively used and present additional attractions of tour offers, though they have a capacity to attract much more visitors for other periods of a year. Mt. Athos –“The Garden of the Virgin Mary”, Meteora, City of Pella- the residence of Alexander the great, Aristotle and its school of philosophy are the right enough cultural attractions to build the regional tourist products on and to increase the demand on tours in the other seasons of the year. Besides, the region holds a great potential for winter resorts touristic offers development or other city cultural attractions popularization (International film festivals, International Jazz festival, Demetria festival or etc.) as well as national celebrations and the religious holidays.

Chart 8. Nights spent at hotels, similar establishments and camping Central Macedonia in 2007



Source: National statistical service of Greece

Relating & Supporting Industries

At a glance Thessaloniki transportation system is quite representative and useful to meet tourists’ needs. All the main transportation means are available: international Airport of Macedonia; international Railway; Sea Port of Thessaloniki; city, intercity and international bus services; taxi and car rental services. The metro construction project is underway as well. Some weaknesses of the transportation should still be addressed: the need of better regulated city traffic and parking system. These two interconnected issues represent the main concern of the city. Poorly organized motor bike and car parking system all over the city creates an unpleasant view and a heavy traffic.

The city is characterized with a highly arranged food service infrastructure. There are lots of cafes, bars, restaurants, fast foods and local cuisine here. There is very well developed net of streets full with restaurants in the city center. Cafes and bars are very conveniently concentrated along the seaside, with a wonderful view of the gulf and a far site of the Mt. Olympus on clear days. The gulf is almost always crowded with local and foreign residents for having fun and rest. Local cuisine is a really delicious one and offers a great variety of food for all kinds of taste.

There is also a quite well developed shopping street in the city center with interesting offers of the local as well as transnational brands and big shopping centers in the suburbs of Thessaloniki.

One of the main aspect of the city infrastructure attracting business visitors is also the International trade fair of Thessaloniki, an official exhibition organization of Greece, presenting a quite huge exhibition space, 17 pavilions and 2 modern convention centers on 180 thousand square meters of territory in the city center. Annually it holds plenty of fairs and events in different spheres of economic activities. Every autumn it hosts an international tourism fair, which offers sophisticated tourism development opportunities to bring all main tourism stakeholders to meet, share and link ideas for the future cooperation. This year the city hosted the 25th Tourism exhibition.

Almost all basic essential services for tourists are available in the region including telecommunication, financial, medical, safety or other services developed enough to feel tourist friendly environment.

Firm Strategy structure & rivalry

The fieldwork we conducted draws the current picture of Thessaloniki based stakeholders’ attitude towards their competitive behavior and development of tourism sector in the region.

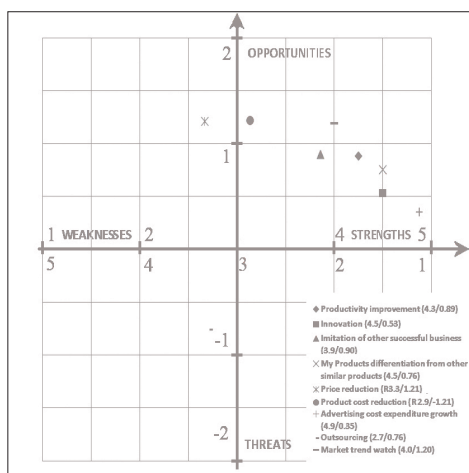
The importance of productivity improvement (4.3) and innovation (4.5) growth is very well understood by the local stakeholders. It is felt that their innovation potential is not strong, but they see the necessity to develop their capacity towards more innovation and to deploy new technologies advancing their

productivity and performance. So, accounting these we consider their attitude strong and see the opportunity rather than the threat. Differentiation of their products (4.5) from other companies' offers rather than imitation of others' success (3.9) can also be considered as their advantage.

The strength is shown in their attitude towards the need of having more market trend watch (4.0). Due to lack of resources, they conduct insufficient market research and most of the connected development findings are filed from the "agents' feeling" through the contacts with customers. Advertising, promotion campaigns (4.9) are commonly graded as the needed most important pillar.

The weak point of their attitude towards the problem was the need of price reduction (3.3) in general, but there was no agreed vision on it, as some stakeholders graded it much lower (St. Dev. - 1.21). Lack of companies' capacity is felt also through their outsourcing activities (see chart 9).

Chart 9. Companies attitude to some internal factors of competitiveness



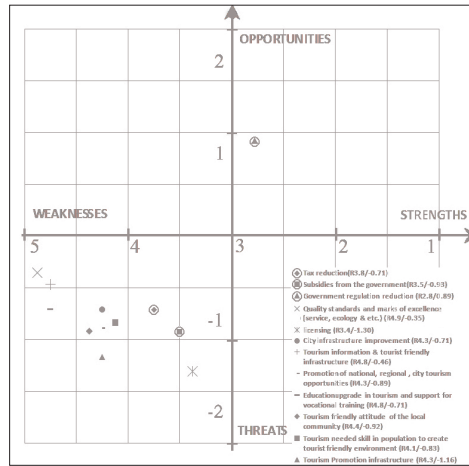
Government

The Government generally focuses on national heritage protection and tourism promotion centralized policy. During the research we came to a number of findings were other stakeholders feel a room for necessary improvement (see chart 10).

The attitude of Academia and Industry towards the government competencies gets into weaknesses and threats on the chart. Industry is a bit in favor of reducing taxes (3.8) and asks for subsidies from the government (3.5) to develop their capacity for its activities promotion. Strict supervision of the quality standards and marks of excellence (4.9); improvement of the tourism friendly infrastructure (4.8), especially promotional one (4.3) and general hard infrastructure; providences of tourism information are also very important pillars addressed by the respondents.

They pointed out that the government regulation reduction (2.8) is less important as it is already in place, and more attention should be paid to the promotion of the regional opportunities by the local authorities.

Chart 10. Private sector attitudes towards competences of the government

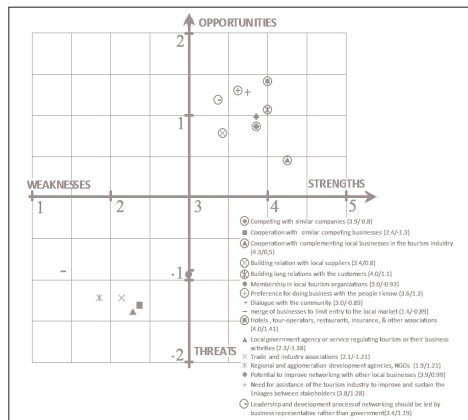


What they see as weaknesses is not continuity the tourism support or promotion policy. The efforts towards strengthening regional tourism education system should be expanded. The interviewers of the Education sector think the government has to encourage tourism friendly attitude and develop skills of the community, tightly cooperating with them and the private sector. It must support participation of all the stakeholders in the tourism development decision making process.

Diamond

Thessaloniki region networking behavior can be classed as extremely weak. The tourism stakeholders report that they strongly compete to the similar businesses (3.9) but weakly cooperate (2.4). They collaborate only with the local suppliers (3.4) and the companies which provide their complementing products (4.3). They have strong relations to the customers (4.0) through personal contacts and give big references to those they've experienced. The stakeholders don't try to merge with other companies to grow their potential of competition if applicable. There is no clear dialogue among government, academia and industry. They try to fulfill their responsibilities separately without cooperation, while the development means joint effort, led by commonly agreed vision, especially for the culture-based products development. (see chart 11). The interviewers believe that the potential for improvement the cooperation between stakeholders really exists (3.9) and the support policy (3.8) is a necessary tool to avoid conflict of interests and start networking activities. They slightly consider that the private sector should take the responsibility of leadership (3.4). Some of them even argue that it is definitely the role of the government.

Chart 11. Networking behavior of tourism stakeholders in Thessaloniki



Most of the stakeholders are the members of associations but get very little benefits of them and are not involved in their activities at all. They use their membership as a promotion tool and can't see other benefits that might be channeled through it. Local associations are quite weak and the members see it clearly, so their leadership is not viable at the moment.

One of the weak points of the interviewed stakeholders' attitudes is also their poor effort to involve the community in the development process. All of them except the university see that this role should be carried by other participators of the process, while the community plays an important role in the sustaining development process, especially culture-based clusters approach to the needs and attitudes of the local population (Canan and Hennessy 1989; Carter and Darlow 1997; Curry 2001; Byrd 2007).

CONCLUSION

Due to the Porter's Diamond model brief study of Thessaloniki culture-based tourism cluster we found out a few important characteristics of the region tourism sector competition and networking behavior.

The research showed that the development of culture-based tourism cluster in Thessaloniki has a great potential, but nowadays it carries very spontaneous character. Its huge resources of culture and history really strive to host tourist. The infrastructure and the services capacity available at the place have enough strength to serve more visitors. There is possibility to develop strong culture-based products that can attract visitors all around the year, rather than for the summer season, as at the moment.

Low innovation capacity, little market research and poor use of new information technologies, insufficient community involvement, few support development tools, low cooperation ties and different attitudes towards the market needs don't give the sector an opportunity to deploy its inputs maximally. All these aspects result losses in rivalry with other neighboring regions in Greece as well as with those outside the country.

A weak leadership of the process tends the stakeholders to act separately and there is no common effort of developing competitive culture-based tourism strategy. Education, industry, government institutions and community have to develop and promote culture-based product through tight cooperation with each other. They have to identify a real leader of the networking process and build a common strategy to boost the growth of the place competitiveness in the worldwide market of the tourism industry.

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