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Aims & Scope

Tourism Today serves as an international, scholarly, refereed journal aiming to promote and enhance research in the fields of tourism and hospitality. The journal is published by the College of Tourism and Hotel Management, Cyprus and is intended for readers in the scholarly community who deal with the tourism and hospitality industries, as well as professionals in the industry. *Tourism Today* provides a platform for debate and dissemination of research findings, new research areas and techniques, conceptual developments, and articles with practical application to any tourism or hospitality industry segment. Besides research papers, the journal welcomes book reviews, conference reports, case studies, research notes and commentaries.

Aims & Scope

The scope of the journal is international and all papers submitted are subject to strict double blind peer review by its Editorial Board and by international reviewers. The journal features conceptual and empirical papers, and editorial policy is to invite the submission of manuscripts from academics, researchers and industry practitioners. The Editorial Board will be looking particularly for articles about new trends and developments within the field of tourism and hospitality, and the application of new ideas and developments that are likely to affect tourism and hospitality in the future. The journal also welcomes submission of manuscripts in areas that may not be directly tourism-based but cover a topic that is of interest to researchers, educators and practitioners in the fields of tourism and hospitality.

Decisions regarding publication of submitted manuscripts are based on the recommendations of members of the Editorial Board and other qualified reviewers in an anonymous review process. Submitted articles are evaluated on their appropriateness, significance, clarity of presentation and conceptual adequacy. Negative reviews are made available to authors. The views expressed in the articles are those of the authors, and do not necessarily represent those of the Editorial Board of *Tourism Today* or of the College of Tourism and Hotel Management.

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NOTE FROM THE EDITOR

Welcome to the fourth edition of *Tourism Today*, the journal of the College of Tourism and Hotel Management. The journal continues to grow and is now attracting submissions from a wider range of authors and thus this edition's articles reflect an increasingly diverse set of interests and perspectives on tourism. With the increasing number of submissions and with increasingly sophisticated submissions, our journal will increase its profile among scholars and others interested in the study of Tourism, we feel. I am especially pleased that many of the articles now report the findings of comprehensive surveys and thus can present the readers with "hard facts" to supplement the theoretical underpinnings of the articles.

In this edition, we have an impressive variety of articles that should be of interest to people for their insights into theoretical issues in the tourism business, their innovative methodologies, or the substance of their findings. For example, those who are interested in some of the theoretical aspects of the study of the tourism business should find Andriotis' piece on Porter's Five Forces and its application to the study of tourism insightful and filled with important implications. Those who are interested in an innovated methodology to learn about perceptions of a country as a tourism destination should look into Komppula and Saraniemi's piece on the organic images of Finland in European markets. Many of the articles offer interesting findings that, apart from their methodology and theoretical importance, are interesting. Some examples of such works are Gherissi-Labben and Mungall's piece on client satisfaction in Swiss alpine destinations and Saethorsdottir's article on perspectives of a wilderness destination in Iceland.

We have already received a number of articles for the next issue of the journal and we are happy that the submissions reflect a diverse pool of authors. We look forward to receiving more articles for future issues and encourage further submissions. Any comments that could help us improve the journal would be appreciated.

Good reading. We hope you enjoy this issue.

Craig Webster
College of Tourism and Hotel Management

Event Tourism Partnership Evolution – Evidence from the Highlands of Scotland

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ABSTRACT

This paper examines event tourism partnerships in the Highlands area of Scotland. These arrangements are profiled in relation to tourism development in the region and to the policies of both regional and local tourism, economic development and arts agencies. Three partnerships are scrutinized within the context of existing theories and observations about the evolution of tourism partnerships that propose stages of context, formation, planning and implementation. It is observed that some event tourism partnerships are terminated once they have accomplished the goals of program implementation and met the policies of regional tourism and economic development and arts strategies, while others continue. Based on the experiences of the event alliances studied a further stage in the evolution of tourism partnerships; that of conclusion is therefore proposed.

Keywords: event tourism, partnerships, Scotland

INTRODUCTION

Partnerships have become an established instrument for tourism development (Greer, 2002). Through collaboration organizations work together to achieve objectives, that working on their own would not be accomplished (Gray, 1989; Waddock, 1991). Partnering allows organizations to combine resources, networking and working with differing groups, often across agencies that have common agendas (McCabe, Lowndes and Skelcher, 1997). The emergence of partnerships between public and private organizations parallels trends in public administration towards the participation of beneficiaries in designing and monitoring projects.

In the Highlands of Scotland partnership arrangements have supported tourism objectives. Examining the cultural tourism offerings of the region (Jolliffe and Baum, 2000) it became evident that event tourism partnerships were instrumental in both contributing to the supply of tourism products and in developing and promoting destination images. Previous arts and culture reports identified a high level of participation in arts activities such as events. It was known that public sector events policies had encouraged collaborating. Within the context of the broader examination of cultural tourism in the region this paper thus examines the evolution of a number of event tourism partnerships in the region. This examination is based

on interviews with key stakeholders in these partnerships in the region in 1998. This information has been supplemented by documentation on tourism in Scotland collected from a number of sources. However, the event partnerships profiled only provide a “snapshot” of the state of event tourism at the time of the study. Since the organization of the Scottish tourism industry continues to evolve, these cases do not reflect changes such as the establishment of the Scottish Parliament and its impact on tourism (see Kerr, 2003). Nonetheless, the examination of the evolution of event tourism partnerships here should provide some lessons and insights for other locations.

PARTNERSHIP CONTEXT

A number of studies contribute to understanding partnership formation in tourism. Using the work of Waddock (1991) on social partnership arrangements between public and private organizations Jamil and Getz (1995) propose a collaboration theory based approach to the planning of community tourism initiatives that includes the three progressive stages of problem solving, direction setting and implementation. Building on the work of Gray (1989) Selin and Chavez propose an evolutionary tourism partnership model with the stages of antecedents, problem setting, direction setting, structuring and outcomes, defining partnership as (1995:844):

“An arrangement devoted to some common end among otherwise independent organizations.”

Drawing on the work of Beamish (1988) examining joint ventures in nature tourism Darrow (1995) proposes a partnership model with the stages of finding a partner, establishing a process, vision sharing, goal setting and making plans, maintaining the relationship and operationalizing the model. These analyses of tourism partnership evolution have a number of common stages (Table 1). An area not addressed by these theories is the conclusion of tourism partnerships.

Comparison of stages in tourism partnership formation (Table 1)

Jamil & Getz (1995)	Selin & Chavez (1995)	Darrow (1995)
	Context and antecedents	Finding a partner
Problem solving	Problem setting	Establishing process
Direction setting	Direction setting	Direction setting and structuring
Implementation	Outcomes	Operating and maintaining

Collaboration is recognized as essential in implementing tourism projects, and festivals and special events are also acknowledged as development catalysts (Getz, 1991). Partnership arrangements for event tourism commonly reflect public policies of regional and local governments and tourism agencies (Long, 1994) as well as a trend in tourism towards partnering between public and private sectors, different levels of government and types of organizations (Hall, 1999). Getz (1997; ix) describes event tourism as:

“A systematic approach to the planning, development and marketing of festivals and events as tourist attractions, catalysts and image builders for attractions, communities and destination areas”.

Event tourism strategies have many objectives. Such strategies attempt to influence visitor perceptions of the destination (McHone and Rungeline, 2001). Getz (1995) notes the potential of large events to shape positive destination images while Backman, Backman, Ysaly and Sunshine (1995) observe that the hosting of events can create a positive image of place. Fredline and Faulkner (2000) identify the role of events in the promotion of destinations. In some cases event strategies are reported to be an integral part of attempts to extend tourism seasons (Hagen, 1997; Baum and Hagen, 1999). Events also may have an economic benefit for destinations (Tyrell and Johnston, 2002).

TOURISM CONTEXT

Located in the western part of Scotland's Highlands of Scotland tourism region the study area is for the most part a rural area. The tourism industry here is made up of a predominance of small family run firms (Birtwistle, 1996). Tourism has considerable economic impact in the area, for example in 1995 tourism related employment in the Highlands of Scotland overall represented 14.6% of employment (Scottish Tourism Board, 1997). Culture and history is one of the basic tourism strengths of the study area.

Government agencies in Scotland have encouraged the development of partnerships. The Scottish Office (1995) in its White Paper for Rural Scotland encouraged partnerships as a means of bringing together local interests and relevant agencies in development proposals. The Scottish Arts Council (1995a) recognized the area for its high level of community participation in cultural and arts activities. Events feature in both the regional economic development and arts strategies of Highlands and Islands Enterprise and in regional tourism marketing endeavors of the Highlands of Scotland Tourist Board (1997). It is thought that collaboration between the arts and tourism in the region to form arts festivals is mutually beneficial (Gilbert and Lizotte, 1998).

Changes in tourism industry organization in Scotland introduced in 1996 divided the responsibility for tourism between different agencies advocating partnership and cooperation between these agencies and those in the industry (Birtwistle, 1996). Kerr, Barron and Wood (2001) outline the resultant complexity of the organization of tourism in Scotland. They

acknowledge the role of the Scottish Tourism Board as the lead organization for developing and promoting tourism. Others involved include the Scottish Tourism Forum, Highlands and Islands Enterprise, Scottish Office Education and Industry Development, Convention of Scottish Local Authorities (CoSLA), Historic Scotland, Scottish Natural Heritage, Scottish Arts Council (SAC), Scottish Museums Council, Scottish Sports Council and the British Tourist Authority. Tourism development and marketing in the Highlands and Islands of Scotland region is thus of relevance to numerous stakeholders. The Highlands Tourist Board (HTB) holds primary responsibility for marketing and visitor services. The Highlands and Islands Enterprise (HIE) and its regional member Local Enterprise Commissions (LEC), such as Skye and Localsh Enterprise are responsible for development (McLellan and Smith, 1998).

LOCAL TOURISM POLICIES

In the area studied the local agency Skye and Localsh Enterprise (1997) recognizes that tourism underpins much of the social and economic life of the area. Their tourism policy has been developed with reference to the 1994 Scottish Tourism Board Strategic Plan, which provided guidelines for public-sector support of tourism, and in relation to the 1996 Highlands and Islands Enterprise Network Strategy for Enterprise Development. This latter policy encouraged the co-ordination of tourism development efforts through local partnerships and pilot projects in tourism. The agency contributes to such projects within a number of principles. Projects receiving assistance must have a positive, measurable impact on one of the key areas of seasonality, length of stay, visitor spending, or potential for repeat business. All projects must be discussed with and have the support of the Highlands of Scotland Tourist Board. The enterprise agency supports the upgrading of visitor attractions (including events) as an important element within the area's tourism infrastructure. The agency acknowledges the cultural advantage of the area in its language, culture and distinctive traditions, and the corresponding potential for cultural tourism. Support has thus been given for Gaelic or bilingual signage and policies, and for the development of existing and new cultural and arts events. Watt (1998) notes it is common for local enterprise agencies to be involved, along with other partners, in supporting events. While public sector funding contributes to partnership projects, the role of the private-sector cultural entrepreneur and community groups is also been important.

Event partnerships in the area are also supported by HiArts. Established in 1990 by the Highlands and Islands Development Board (the predecessor to Highlands and Islands Enterprise) the initial purpose of the organization was to process funding and coordinate marketing for the Hi Light Year of the Arts from November 1990 to October 1991 (Scottish Arts Council, 1995b). Jointly funded by Highlands and Islands Enterprise and the Scottish Arts Council HiArts remit is to promote the arts in the Highlands and Islands. Working in partnership and collaboration with others the agency has been instrumental in supporting a number of event partnerships in the region, including Cuirm Cuain (The Festival of the Crossing), profiled in this paper. Another agency involved in event development is The

Gaelic Arts Agency, PrGoiseach Nan Ealan which has been instrumental in supporting Gaelic events, encouraging the formation of Feisean nan Gaidheal, an umbrella organization for the feis (festival), or tuition based events.

With so many agencies having an interest in events it is natural that event tourism in the region will be the result of partnerships of key stakeholders from the local and regional level, who are in the position to lever resources to implement events. Policies have supported the creation of alliances developing a wide range of events, meeting defining criteria for festivals and events identified by Getz (1991). Types of festivals held in the area range from local feis to local and regional arts events such as Feis an Eilein (The Skye Festival) and the Highland Festival. Other festivals held include the Skye Folk Festival and the Isle of Skye Highland Games.

CASE EXAMPLES

Three individual cases of partnerships in support of event tourism were examined against this backdrop of an area with an exceptionally high amount of arts activity per capita (Mackay's Consultants 1991 in Scottish Arts Council 1995b). An added factor is the encouragement of event partnerships by regional and local economic development and arts policies (Highlands of Scotland Tourist Board, 1997; Skye and Lochalsh Enterprise, 1997). The examples profiled are:

- Feis an Eilein (The Skye Festival) - a regional festival operated by a partnership of a community arts organization and a local college with the support of local and regional arts and economic development agencies.
- dEALAN - an events related arts development project operated by a private agency with the support of the Scottish Arts Council and the participation of local and regional event organizers.
- Cuim Cain (The Festival of the Crossing) is a festival on the regional ferries developed by HiArts with the initial support of the Scottish Arts Council, in partnership with Caledonian MacBrayne (the ferry operator), local enterprise agencies, local artists and others.

EXAMPLE 1: FEIS AN EILEIN (THE SKYE FESTIVAL)

This is a well established festival, operated by a partnership between a local arts agency, SEALL, the local Gaelic College, local communities and performers in the south of the Isle of Skye. The community-based group SEALL established around 1990 organizes The Skye Festival, Feis an Eilein, in co-operation with the local Gaelic college, Sabhal Mor Ostaig. The sixth annual festival in 1997 was co-coordinated with the fiddle and dance summer schools held at the Gaelic College presenting two weeks of Celtic, Gaelic, and World Music, and theatre. Performances were based in South Skye and in venues throughout the area. The festival included a daily festival café, lunchtime concerts in Ardvasar Hall, and afternoon

workshops in traditional dance, music, Gaelic song, and storytelling (MacInnes, 1998). This case demonstrates the involvement of a local college and a community in partnering for event tourism. This involvement stems in part from the mission of the college: Sabhal Mor Ostaig is committed to being a centre of excellence for the development and enhancement of the Gaelic language, culture and heritage, by providing quality educational, training and research opportunities through the medium of Scottish Gaelic; and by interacting innovatively with individuals, communities and businesses, to contribute to social, cultural and economic development (Sabhal Mor Ostaig 1998). The local agency Skye and Lochalsh Enterprise has provided support for both the efforts of the college and the festival (Skye and Lochalsh Enterprise, 1997) and other agencies that have supported the festival over the years have included the Scottish Arts Council, Iomairt Chòlm Cille (an organization that promotes the Gaelic Language in Scotland and Ireland), and the Highland Council. The role of these agencies demonstrates the importance of regional event tourism strategies and related funding in nurturing event tourism partnerships at the local level.

EXAMPLE II: dEALAN

This Scottish Arts Council supported three year arts development project (SAC, 1996) aimed to contribute to building stronger networks and partnerships among arts performers, groups and agencies in the Skye and Lochalsh region. dEALAN was co-coordinated by a local arts organizer, who, with over ten years of practical experience, had also been involved with the community arts group, SEALL. Promoters of local events felt a need to co-ordinate performances, in order to avoid economic losses caused by similar events taking place in the same area, at the same time. Moreover, co-ordination allows for organization and marketing in the form of festivals and thematic series of events. dEALAN was therefore mandated as a support service for community groups, to develop the efficient use of touring companies, funding, resources, and marketing (MacInnes, 1997).

It accomplished this mandate by joint planning, marketing, and funding initiatives. Central to the project is, a calendar of event bookings called an "Anti-Clash Diary", designed to avoid clashes in events. dEALAN also operated as a central contact into the community, advising on the most suitable dates, promoters, and venues. dEALAN provided events listings to the local Tourist Information Offices and placed an arts and entertainment listing flyer within a tourism folder in each tourist accommodation unit in Skye and Lochalsh. Events have been coordinated through the events hotline and through several listings on the World Wide Web. Although the three-year funding term for dEALAN concluded in 1997 there is still a need for the services it provided without cost to the arts community. This arts development project was designed as a partnership among the main arts promoters in Skye and neighbouring Lochalsh, the community, and arts funders. It is significant that this partnership was able to work across organizations (McCabe, Lowndes and Skelcher, 1997) to achieve results in the coordination of the listing of events.

EXAMPLE III: CUIRM CUAIN (THE FESTIVAL OF THE CROSSING)

This festival is the result of a partnership between the regional arts agency HiArts, the ferry operator, Caledonian MacBrayne and local cultural groups. During this festival local interpreters and performers present environmental and cultural events on board ferries traveling on selected scheduled routes between the mainland and the Scottish Islands. Events range from traditional Scottish stories and songs to an illustrated talk on the local environment. The idea of a festival on a ferry originated from the Scottish Tourist Board's Public Transport and the Tourist project in 1992 and. A set of operational guidelines was drawn up with the assistance of the ferry operator (Scottish Arts Council, 1995b). A pilot project was carried out during the summer of 1994 on the ferry linking the Island of Islay with Colonsay and Oban, focusing on the traditional Gaelic songs and Celtic dance of Islay. This programme was evaluated (Webster, 1995) and deemed a success and HiArts agreed to co-ordinate the festival, beginning in 1995.

During 1996 Cuirm Cuain presented over 160 events involving musicians, storytellers, local historians, countryside rangers and environmental guides, on scheduled ferry routes in July and August. Caledonian MacBrayne provided passage and a meal for performers, HiArts organized the festival with grant funding from Argyle and Islands Enterprise, Argyle and Bute Council, Arts and Tourism Scotland, Comunn Na Gaidhlig, Highlands and Islands Enterprise, Tourism and Environment Initiative, Western Isles Tourist Board and Western Isles Enterprise (Campbell, 1996). This demonstrates support of event tourism strategies by the regional and local government and enterprise agencies. A reduced programme for 1997 included 60 events on 5 scheduled ferry routes during July and August. For 1998 the festival further evolved into Cuirm Cuain - The Next Generation, local groups and young performers performed in return for passage and a meal and HiArts continued to co-ordinate (Campbell, 1998). Caledonian MacBrayne was nominated for several industry tourism awards for their partner role in the festival (Livingstone, 1998).

ANALYSIS

This section examines the event partnerships reviewed within a four-stage framework derived from the partnership literature (Jamil & Getz 1995; Selin & Chavez 1995; Darrow 1995). This provides a comparative view of three different partnerships developed within the same tourism context (Table 2). In addition, the stage of conclusion, observed through the examples profiled here, is discussed and proposed as being an additional step in the evolution of tourism partnerships.

Comparison of the Example Tourism Partnerships (Table 2)

Example	Context	Planning	Formation	Implementation	Conclusion
I – Feis An Eilein	Community partnership	Community arts agency	Established circa 1990	Annually	Still Held
II - dEALAN	Arts agency arts promoters, community	Arts consultant and community	1994 - funded by the Scottish Arts Agency	Pilot Period 1994 - 1997	Concluded
III – Cuirm Cuain	Public private partnership	Regional arts agency, local performers, ferry service	1992 Scottish Tourism Board recommended 1994 HiArts pilot	Pilot 1994 Festival 1995 - 1998	Concluded

CONTEXT STAGE

In the first stage in event tourism, that of context and antecedents, the seeds for future partnership are sown by favorable public policy and funding contexts. Greer (2002) indicates the contextual issues focus on the background or environment in which partnerships operate. The partnerships profiled evolved from issues in arts and tourism development and were geared towards problem solving, reflecting the antecedents to partnership formation noted by Selin and Chavez (1995). In the examples profiled partnerships were nurtured by a public policy context in the Highlands and Islands of Scotland that encouraged collaboration. Start up funding was often provided (i.e. Cuirm Cuain, dEALAN) to develop both events and a support system for event formation in the region. This public policy support of event partnerships was observed at all levels, from the local enterprise agencies (such as Skye and Lochalsh Enterprise) to regional arts and development agencies (HiArts, Highlands and Islands Enterprise) to government agencies and departments with a broader remit (such as the Scottish Arts Council and the Scottish Office).

FORMATION STAGE

In the formation stage the event partnerships profiled adopted objectives that included both the events outcomes themselves and secondary benefits. These benefits include for example, the development of local arts and the provision of education and entertainment for tourists. The two arts organizations located in south Skye, SEALL, the community arts group, and dEALAN, the funded arts development project were both instrumental in partnering and in increasing the profile of the arts in the area by organizing a major festival and by marketing touring arts events throughout the year. While the main purpose of the festivals studied is thematic celebrations a number of these events have educational objectives. This educational

mandate is characteristic of event development in the region, paralleling the increased interest of visitors in educational forms of tourism. This is demonstrated by various feis – tuition based educational offerings - such as those included in Feis an Eilein (The Skye Festival).

PLANNING STAGE

The next stage of developing event partnerships is planning. Several of the partnerships profiled evolved from pilot projects whereby ideas and concepts for events were organized and tested on a trial basis. The pilot allows for the evaluation of an event concept, as in the case of the Cuirm Cuain (Festival of the Crossing), and for the subsequent refining of the concept before being offered on an annual basis. Long (1994, 1997, 1999) discusses the fact that local tourism partnerships are comprehensive and integrated in approach and normally include development, marketing, information and delivery functions. This is the case with the partnerships profiled. These endeavours reflect the partnership outcome characteristics profiled by other authors (Selin & Chavez, 1995; Jamil and Getz, 1995, Darrow, 1995) in that they are action oriented with an emphasis on implementing initiatives. The partnerships studied reflect another characteristic referred to by Long (1995) in being corporate in approach, involving objectives shared among participating organizations.

IMPLEMENTATION STAGE

Once event partnerships are formed and activities planned they must be implemented and maintained. In the coordination of regional events held in a variety of locations and created by a number of partners the festivals studied have built strong relationships in support of event outcomes. Brinkerhoff (2002) discusses relationship building as an important criteria for assessing partnership success. Partnerships have been essential in maintaining the festivals and festival support systems studied. The devolving level of programming of Cuim Cuain (The Festival of the Crossing) demonstrates the evolution of event partnerships over time. While Hi-Arts took the leadership in implementing the festival one of the strengths of Cuirm Cuain was a broad basis of support, in principle, from the participants for the idea of the festival. Evaluation and flexibility allowed the festival organizers to learn from each years programming and to adapt to the resources available for the coming years event. However, no local group came forward to take ownership and control of the festival. Thus the central agency, HiArts continued as the lead player in implementing the event tourism strategy for the Festival of the Crossing.

CONCLUSION STAGE

An analysis of the three event tourism partnerships in the Highlands of Scotland indicates that some events progress through a further stage of partnership development, that of conclusion. The partnerships profiled have not all been sustained over the long term. Of

the three event tourism partnerships profiled in this paper only one still exists, that of Feis an Eilein - The Skye Festival. Darrow (1995) indicates that maintaining partner relations on an ongoing basis is a part of the evolution of tourism partnerships. Brinkerhoff (2002) observes that a traditional causal chain has been utilized for determining the outcomes of partnerships, which includes prerequisite success factors, partner performance and programmatic outcomes. These trends pose a challenge to event tourism planners operating in a situation that nurtures the establishment of event partnerships, as is evidenced by pilot project support, rather than the ongoing maintenance of festival partnerships. For the long term existence of event alliances the examples profiled are evidence that it is desirable for local communities to take ownership of and leadership in sustaining such arrangements. For example, in the cases studied the community based Feis Eilein: The Skye Festival has been sustained on a long-term basis whereas the regionally implemented Cuim Cuain: Festival of the Crossing decreased its programming due to declining interest and resources. It is possible that a more strategic approach to building long term partner relations rather than an outcomes focus might have contributed to sustaining alliances on a long term basis.

This study also reveals that beyond the staging of events these event alliances have valuable secondary outcomes in:

- Building relationships among different agencies and organizations.
- Strengthening culture and supporting the accessibility of arts.
- Adding to the product base and increasing the attractiveness of the destination.
- Creating economic impacts.

In the examples studied event partnerships allowed participating organizations to build relationships with other agencies and to work together to achieve common objectives. For example, the festivals contribute to the development of a strong Celtic/Gaelic cultural identity for the area. Regional tourism policies support this objective (Highlands of Scotland Tourist Board, 1995). Both SEALL and dEALAN made the performing arts accessible in a rural area (Scottish Arts Council, 1995a). With the initial purpose of making culture accessible locally, the groups studied have impacted the event products of the region being available for tourism. Tourism also contributes to sustaining arts activity in the region, particularly through attendance at festivals, as noted by a study of the economic and social impact of the arts in the region during October 1999 to September 2000 (Independent Northern Consultants, 2001).

As Getz (1991) has pointed out, for the visitor events strengthen the destination attractiveness. Events may increase the competitiveness of the destination for the strong cultural identity associated with these events serves to distinguish this region from others. For some visitors participation in a festival on a chance basis may add value. This was the case with the Festival of the Crossing; a free event available to visitors traveling on selected scheduled summer ferry crossings. It is also thought that the festivals have an economic impact on host communities.

CONCLUSION

This paper has highlighted the emergence of event tourism partnerships and their development as instruments for implementing events and achieving other related objectives. In the case of the event tourism partnerships studied in the Highlands and Islands of Scotland the context for the establishment of strategic alliances in support of event tourism included: a political and economic climate that encouraged partnering; a high level of arts activity and participation; and the encouragement of arts, tourism and enterprise agencies. The event partnerships studied reflect the objectives of the regional and local agencies in highlighting the area's cultural distinctiveness for the purposes of tourism. This positive climate for event development nurtured the development of events with both entertainment and educational objectives. It is significant that several partnerships highlighted evolved from pilot projects, pointing to the importance of special projects as stimuli for event tourism. In this situation many agencies and stakeholders had an interest in creating events partnerships, bringing participants together in working toward programmatic outcomes.

This study has benefited from profiling partnerships for event tourism in the Highlands and Islands of Scotland. With the rich cultural context and the evolving nature of tourism administration and organization in Scotland regions such as this will continue to provide a fertile location for the study of the formation of tourism partnerships. Through this study it is suggested that a further stage in event development, that of conclusion be added to the previously published theoretical constructs regarding stages in tourism partnering. It is also observed that event tourism partnerships have incorporated objectives beyond the staging of the events themselves. The further study of the conclusion stage may provide additional insights into the staging of the evolution of partnerships. For example, when tourism partnerships conclude are the participants more likely to enter into new partnership relationships with other organizations? Future research may examine in more depth this newly identified concluding stage in the evolution of event partnerships.

POSTSCRIPT

In 2003 HiArts released a consultancy report on the need for a Highlands and Islands Festivals Forum. The report summarized the response of twenty six arts festival operators. The findings echo some of the observations on community ownership of events made during field work for this paper.

“A number of festivals reported that they would like to get their local community to take greater ownership of their festival and participate more.” (HiArts, 2003; 3) Operators surveyed cited key challenges that included funding, volunteers, administrative support, infrastructure, accommodation for visitors, venues, facilities and equipment, a lack of advocacy, coordination, sponsorship, forward planning and the high cost of essential services.

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Competitiveness of Swiss Alpine Destinations in Summer Season: A Client Satisfaction Approach

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ABSTRACT

Based on hotel client satisfaction, competitiveness of Swiss Alpine destinations in summer season was measured at two levels: hotel level and resort level. 20 Swiss Alpine destinations were selected, as they are poles of development. A questionnaire, based on a benchmarking model adapted to the Swiss Alpine context in summer season, was distributed among hotel clients in selected destinations during summer 2002. 1311 questionnaires were completed and returned in all. Empirical results put forward that the entertainment factor at two levels discriminates the best from the least performing destinations. Further results show that the most satisfied tourists at the hotel level are those older than 60 who already visited the destination. Moreover, clients staying in 4 and 5-star hotels are generally much more satisfied than the others. At the resort level, families staying between 5 and 6 nights, practicing sports and having family activities are amongst the most satisfied clients.

Keywords: Tourists'/customers' satisfaction, Summer Alpine tourism, hotels'/resorts' competitiveness

INTRODUCTION

Due to its mountainous nature, a significant proportion of tourism activity in Switzerland is highly seasonal and mainly orientated towards winter. The summer season is still present in mountain regions although to a much lesser extent. However, competition has recently increased from remote destinations as well as from other European Alpine destinations.

An extensive study led by the research department of the "Ecole hôtelière de Lausanne" created a benchmarking model for Swiss Alpine destinations based on tourist and hotelier satisfaction. This model helps the hoteliers to continuously compare their performances with the market leaders in the summer season. The objective of this article is not to describe in detail the benchmark model which will be used by professionals, but to measure hotel client satisfaction with regard to alpine destination tourism supply considered at two levels: hotel level and resort level. This paper identifies what should be improved during the summer season in the different alpine destinations to increase customer satisfaction and consequently these destinations' competitiveness.

LITERATURE REVIEW

Firstly, a chronological overview of the evolution of the tourism structure in Alpine regions is given followed by a presentation of the problems related to summer alpine tourism. Switzerland will subsequently be presented as an alpine tourism destination before finally discussing benchmarking in the hospitality and tourism sector.

AN OUTLINE ON ALPINE TOURISM DEVELOPMENT

Before the 20th century Alpine tourism was characterized by long-haul journeys undertaken by a few wealthy people, and the supply side was composed mostly of simple inns for accommodation. It was mainly during the inter-war and post war period that mass travel developed. Alpine tourism rose steadily with the opening up of transport into alpine destinations, the establishment of commercialised accommodation and the construction of the first cable cars and ski lifts.

Up to the 70's small tourism enterprises expanded through entrepreneurial families, with a strong demand for Alpine tourism. During the 80's tourism demand faced its first development downturn. With a reduced role given by tourists at that time to skiing as the principle motivation for holidays taken over the winter period, the proportion of people going skiing, as well as their length of stay, fell sharply (Monteiro S., 1996; Tuppen J., 2000; Weiermair K. & Auer W., 1997).

Then during the 90's tourism firms were compelled to rapidly improve their respective competitiveness following: (i) changes in tourist preferences, (ii) development of tourism information technology, (iii) globalisation of the industry with its associated tendencies towards integration and concentration. In addition, extreme seasonal and unreliable weather still remained challenges for tourism in mountain areas. With these developments tourism companies were pushed to better position their services and products. This in turn required service quality inherent in tourism services strongly controlled and managed, and a consequent marketing of these service qualities in the global market (Weiermair K. & Auer W., 1997).

SUMMER ALPINE TOURISM

Alpine destinations suffer regularly from declining volumes of activities in summer. Price competition is becoming stronger from remote destinations as well as European cities as a result of cheaper airfares. Moreover, in Europe, seaside destinations are still preferred for summer holidays by most people.

One of the important questions concerns what the customer is looking for when choosing a holiday destination in the summer. A study made by Sociovision Cofremca, a French business company specialised in clients' behaviour studies in the mountain areas, highlights three motivations for the tourist: (i) to take a break from his day-to-day life and familiar surroundings; (ii) to renew contacts; (iii) to recharge his batteries in a personal and natural manner.

According to Mrs. Evelyne Mathelet (2002), the research department manager of New Deal, a French business consultancy firm in operational marketing with a special focus on mountain resorts, visitors wish to have more freedom to organize their trip. They also dislike reserving a long time in advance and are getting used to going away for two or three nights. They also expect to see something new, and want to remain mobile. As added by Mrs. Mathelet (2002), clients do not easily associate mountains with the summer. The would-be holidaymaker considers that mountains are unfriendly. If interested in this type of holiday he would prefer a well maintained mountain, with lots of interesting things to do and well marked paths easy to follow. Travellers prefer package deals as they feel that mountain folks are only interested in their money. In their opinion, mountain regions are too expensive, too complicated, and too dangerous.

SWISS ALPINE TOURISM CASE

Tourism is an important factor in the economic development of mountain areas in Switzerland. This importance is reflected in the geographic distribution of available hotel beds across the country. The share of those located in mountain areas amounted in 2003 to 35%, compared to 30% in small cities/countryside, 20% on lakeside and 15% in large cities (Swiss Federal Statistical Office, 2004).

Switzerland did not perform well internationally during the 90's in terms of international tourist arrivals. The average annual growth decreased by 2.7% between 1990 and 1995 and by 0.9% between 1995 and 2000. These figures are to be compared to an average annual growth rate of 2.8% and 4% for Europe as a whole, 3.2% and 3.3% for the Americas, 6% and 6.5% for Africa, 8.2% and 6.1% for Asia & the Pacific, and 7.1% and 11.9% for the Middle East (World Tourism Organisation, 2003). Results for the period 2000-2002 were heavily influenced by the events of September 11th 2001, especially for the regions of the Americas and the Middle East. However, Switzerland did still continue to perform badly compared to the other regions during that period. International tourist arrivals decreased by 1.8% between 2000 and 2001, and by 7.4% between 2001 and 2002, compared to a decline of 0.5% between 2000 and 2001 and a growth of 2.3% for Europe, a growth of 3.2% and 2.8% for Africa, and 5.1% and 8.4% for Asia and the Pacific (World Tourism Organisation, 2003).

The performance looks particularly poor for Swiss ski resorts. During the last decade, the share of mountain resorts in the total hotel overnights in Switzerland has decreased, from 41% in 1992 to 39% in 2003, mostly to the benefit of larger cities whose share increased from 15% to 18% during the same period (Swiss Federal Statistical Office, 2004). Thus, many hotels in Swiss mountain destinations close during the off-season period.

Many Swiss alpine destinations have looked into ways of promoting summer holidays. For example, Verbier highlighted special events such as an ascensional parachute competition and international horse jumping. However this manner of promoting mountains for summer holidays necessitates constant investment and renewal of sponsors. Less costly forms of

publicity are however possible, for example the successful puzzle festival in Zermatt. Besides, the destination must also offer a wide choice of activities to attract the holidaymaker and ensure that the message reaches potential clients.

BENCHMARKING IN HOSPITALITY AND TOURISM

In an increasingly competitive environment for organisations, a self-evaluating process is one of the greatest challenges for management (Hyatt, 2001). One such strategy is benchmarking, “See what others are doing in order to be the best”. Instead of their own approaches to problems, numerous large companies opt for benchmarking methods to improve their performances. In the USA, more than a third of companies are willing to use this technique and in Europe this solution is increasingly used (Piedalu, 1996).

Literature relative to benchmarking models in tourism is divided into two main groups: destination models (Ritchie & Crouch (1993); Flagestad & Hope (2000); Miller (2000)) and hotel models (Min & Min (1996)). There has been little research to measure performance levels of small businesses either as individual organizations or as components of tourist destinations (Kozak & Rimmington, 1998). As volatility in small businesses is considerable, they represent the type of organizations that most need benchmarking. Simultaneously, as they have insufficient resources they are inclined not to carry out this process (Micklewright, 1993). However, benchmarking helps small businesses in the hospitality industry to measure performance and raise standards (Kozak & Rimmington, 1998). Grading and assessing destinations also helps keep tourists well informed about hotels and other businesses.

Both in the benchmarking field and theoretical and managerial perspectives (Evans, Fox & Johnson (1995); Hassan (2000); Ritchie, Crouch & Hudson (2000)), it is increasingly important to thoroughly understand relevant factors for sustainable competitiveness in a tourist destination. The models already developed are mainly based on measurable factors such as productivity, profitability and geographical situation which can be easily understood by professionals in tourism (Ritchie, Crouch and Hudson, 2000). The most exhaustive model is the Aiest (International Association of Scientific Experts in Tourism) one conceived by Ritchie & Crouch (1993). It should be noted that, in this context some factors can only be assessed from a tourist perspective (climate, welcome, etc.). Consumers are used to benchmark aspects of performance against competitors since they are an obvious source of external ideas. Surveys enable them to give their opinions about the destination. As with other businesses and industries, ordinary destinations will lag behind better performing ones. Monitoring tourists’ perceptions of competitive performance is therefore important. In recent years research has mostly focused on elements (i.e. satisfaction, value, confidence) used by tourists to compare different destinations (Ritchie (1996); Van Raaij & Crotts (1994)). As highlighted by Sharpley & Sharpley (1997) without the consumer there can be no sustainable tourism.

METHODOLOGY

The study follows a three-step methodology:

- Creation of a Swiss alpine destination benchmarking model;
- Identification of a sample of Swiss alpine destinations covered by the study;
- Elaboration of a questionnaire for the survey among tourists.

BENCHMARKING MODEL FOR SWISS ALPINE DESTINATIONS

As previously indicated, tourist opinion is very important in assessing and comparing destinations. Thus, the proposed benchmarking model concerning Swiss Alpine destinations is totally based on tourist satisfaction. Moreover, two levels of destination benchmarking are important: resort level (all tourism services of the destination taken into account) and hotel level (only the hotel product is considered). The first version of the benchmarking model was formed by merging different existing benchmarking models and adapting them to the Swiss Alpine destinations context in the summer season. The final version (table1) was obtained after tests among a few hoteliers and experts.

Table 1: Swiss Alpine Resorts Benchmarking Bi-dimensional Model

Resort Level		Hotel Level	
General competitiveness factors	Competitiveness indicators	General competitiveness factors	Competitiveness indicators
Welcome	*Sense of hospitality *Professional skills	Welcome	*Sense of hospitality *Professional skills *Language skills
Entertainment	*Variety of activities offered *Variety of night entertainment activities *Summer opening hours of all leisure facilities	Entertainment	*Variety of hotel leisure facilities
Quality/Price ratio	*All leisure facilities quality/price ratio	Quality/Price ratio	*Room quality/price ratio *Extra charges quality/price ratio
Well-being	*Main activity for visiting destination *Ease of access *Public transportation *General infrastructure	Comfort	*Comfort offered by hotel

SWISS ALPINE DESTINATION SAMPLE

To identify a sample of Swiss Alpine destinations a selection of criteria was established: altitude of more than 1000 meters, important ski activities in winter and a minimum of 9 hotels. At this stage a high number of destinations were obtained. With the help of a geographer from the Swiss Federal Institute of Technology of Lausanne, different groups of Alpine destinations were identified in geographical terms. For each one a destination was selected as a development pole for this region. A list of 20 destinations was formed. These destinations, then grouped by tourism areas, are the following:

- Oberland bernois: Gstaad; Lenk; Adelboden and Grindelwald
- Vaud/Leman: Villars-sur-Ollon; Leysin and Les Diablerets
- Les Grisons : Flims ; Lenzerheide ; Arosa ; Davos ; Klosters and St Moritz
- Suisse orientale : Wildhaus
- Le Valais : Champéry ; Verbier ; Zermatt ; Saas-Fee ; Leukerbad and Crans-Montana

QUESTIONNAIRE DESIGN

To measure tourists' satisfaction of the competitiveness indicators in Swiss Alpine destinations during the summer season, a questionnaire survey, written in four languages, was conducted in selected destinations. Each competitiveness indicator contains 4 levels on the Likert scale (very satisfied/not satisfied). A "non-applicable" option was also added. The importance of competitiveness factors was measured by asking each interviewee to attribute a mark from 1 to 4 (4=very important; 1= not important). This tourist perspective questionnaire was conducted during the 2002 summer season among hotel clients. Researchers were sent to the chosen destinations in order to randomly select hotel clients to be interviewed in places such as cafés. Between 50 and 100 questionnaires were completed for each Swiss Alpine destination using this approach. 1311 questionnaires were completed and returned in all.

MAIN EMPIRICAL RESULTS

This chapter begins by describing the main characteristics of the population sample. Later the analysis concentrates on a few important aspects regarding tourists' perception of hotel, resort and destination competitiveness.

SAMPLE DESCRIPTION

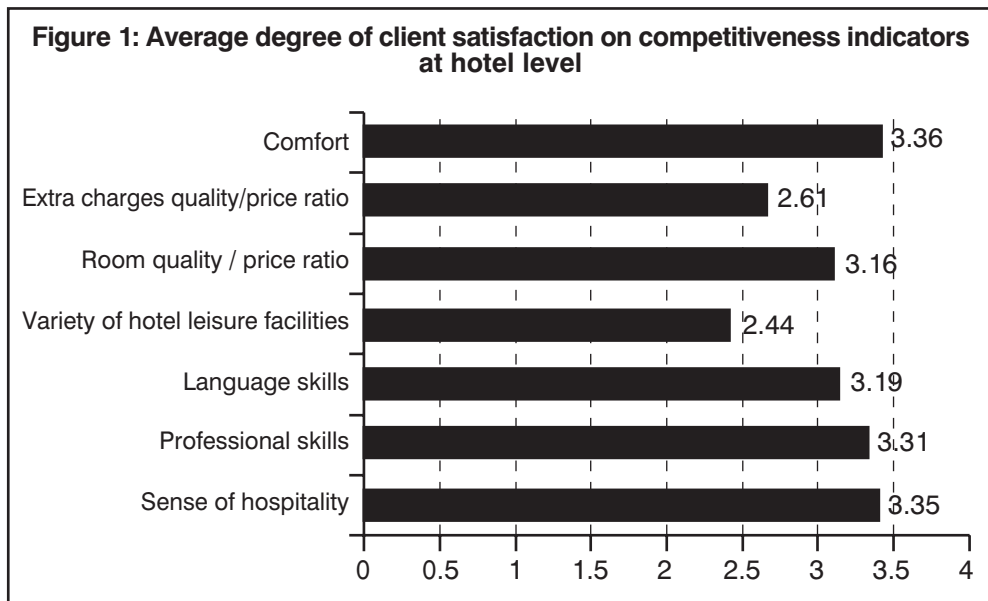
In terms of nationality the sample comprises 35% of Swiss tourists, 27% from neighbouring countries and 23% from the rest of Western Europe. The remainder come mainly from Northern America (7%) and Asia (5%). This client sample is quite representative of the distribution of hotel overnight stays in Swiss mountain areas in summer season according to client nationality. However, the share of domestic tourists is actually higher in reality, at around 50% (Swiss Federal Statistical Office, 2004), while it is lower in the case of tourists

from countries of Western Europe other than the neighbouring ones.

These tourists are mainly between 30 and 45 years old (36%) and between 46 and 60 (27%). Customers under 30 or over 60 each account for 19% of the total. These tourists mostly stayed in 3-star (39.2%) and 4-star (28.6%) hotels, while 16% stayed in 2-star hotels, 7% in 5-star hotels and 5% in 1-star hotels. They were mostly accompanied by a partner (36%) or family (31%). Groups represent 23% while individuals make up only 9%. The reasons for visiting Swiss Alpine destinations are mainly hiking (58%), relaxation (40%) and sports (31%). Finally, a slight majority of tourists have already visited the destination in winter.

TOURISTS' PERCEPTION OF HOTELS' COMPETITIVENESS

As shown below in Figure 1, at the hotel level clients are most satisfied with sense of hospitality and comfort, while they are significantly less satisfied with variety of hotel leisure facilities and extra expenses quality/price ratio.



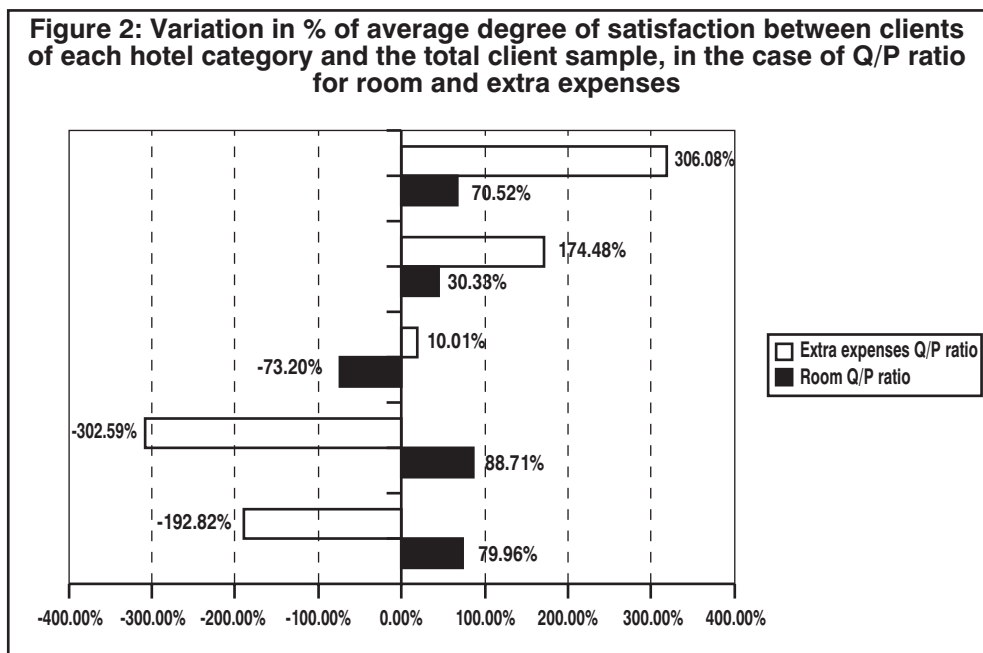
On the hotel level, there are four issues: quality/price ratio of 3-star hotels; tourist satisfaction among lower/upper-category hotels; satisfaction among young tourists and loyalty towards Alpine hotels.

Problem of quality/price ratios for lower category hotels

Variation in percentage of average client satisfaction between clients of each hotel category and the total client sample was measured for quality/price ratio (room and extra expenses).

On this basis, as shown below in Figure 2, this variation in satisfaction between 3-star hotel clients and the total client sample is observed to be negative for room quality/price ratio. On the other hand, variations are highly positive in the case of clients of the other hotel categories.

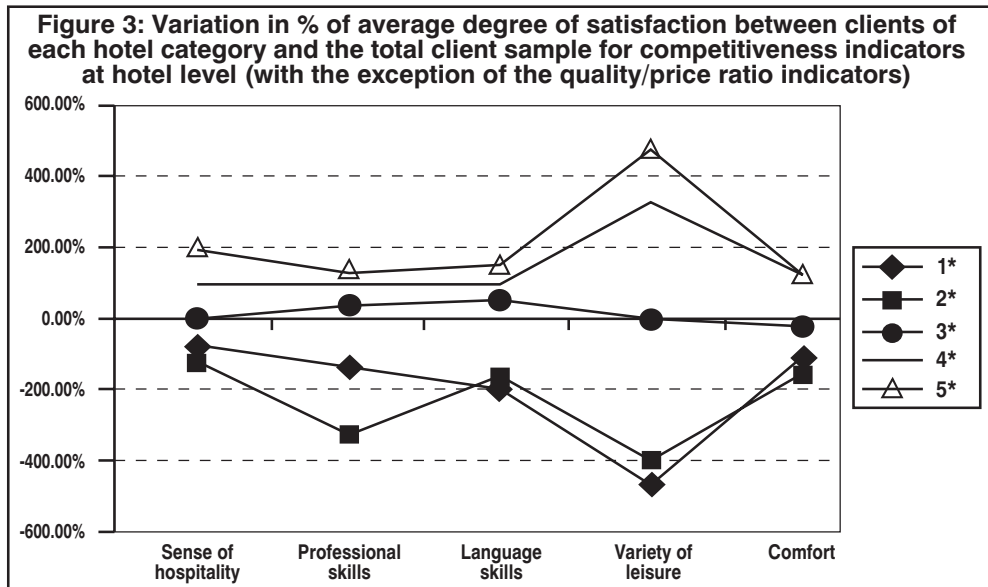
Concerning the quality/price ratio covering extra expenses, the 3-star hotel clients showed on average a degree of satisfaction close to the average in the total client sample. At the same time, satisfaction of lower-segment clients is on average significantly lower than the average in the total client sample, while it is significantly higher in the case of the upper-segment clients.



Performance gaps between upper and lower hotels categories

In this section, the 3-star hotels will not be covered as, apart from the room quality/price ratio problem, their clients have an average of satisfaction equivalent to that of the total client sample. Also, as the quality/price ratio factor was analyzed in the above section, this part deals with the remaining 5 competitiveness indicators.

As illustrated below in Figure 3, the analysis of the variation of the average client satisfaction for the different indicators between clients of each hotel category and the total client sample shows on one hand that satisfaction of lower-segment clients is on average lower than that of the total client sample, while upper-segment clients are on average more satisfied than the total client sample.



In spite of the good results, in general, covering competitiveness indicators in the case of clients of 4 and 5-star hotels, 4-star hotels appear a little less competitive. Indeed, although on the comfort level the two hotel categories were equally appreciated, the 4 star hotels were less appreciated on the professional and language skills indicator level. Where the gap widens between these two categories is at the level of the variety of hotel leisure facilities and the sense of hospitality.

For 1 and 2-star hotels, opinions are below the general average of the whole sample. Contrary to the 5-star which outclass 4-star, one star hotels seem to be better appreciated than 2-star ones. This is especially true concerning professional skills and to a lesser extent on the sense of hospitality and comfort levels.

Finally, the competitiveness indicator which seems to differentiate the upper from lower hotel category is undoubtedly the variety of leisure facilities as clearly shown in Figure 3.

Inadequacy of hotel supply for young tourists

With reference to the degree of client satisfaction according to their age, tourists younger than 30 are on average less satisfied than the other clients for each indicator, with the exception of the language skills of the hotel personnel as young people actually tend to speak more languages compared to older people. Moreover, they are the most dissatisfied on the level of extra expenses quality/price ratio and the variety of hotel leisure facilities.

In general, the summer hotel supply corresponds better to expectations from tourists over 60 years old. However, these tourists seem to be dissatisfied with the variety of leisure facilities offered by hotels.

In addition, with the help of a multivariate analysis of variance (MANOVA) testing the joint influence of two nominal variables (client age and hotel category) on the values of a numerical variable (client satisfaction on competitiveness indicators at hotel level), the analysis shows that young tourists are significantly more satisfied with upper category hotels, which is also the case for tourists of other age categories. Only for room quality/price, do young tourists seem to be significantly more satisfied with 1-star hotels. This could be explained by young tourists' sensitivity to price.

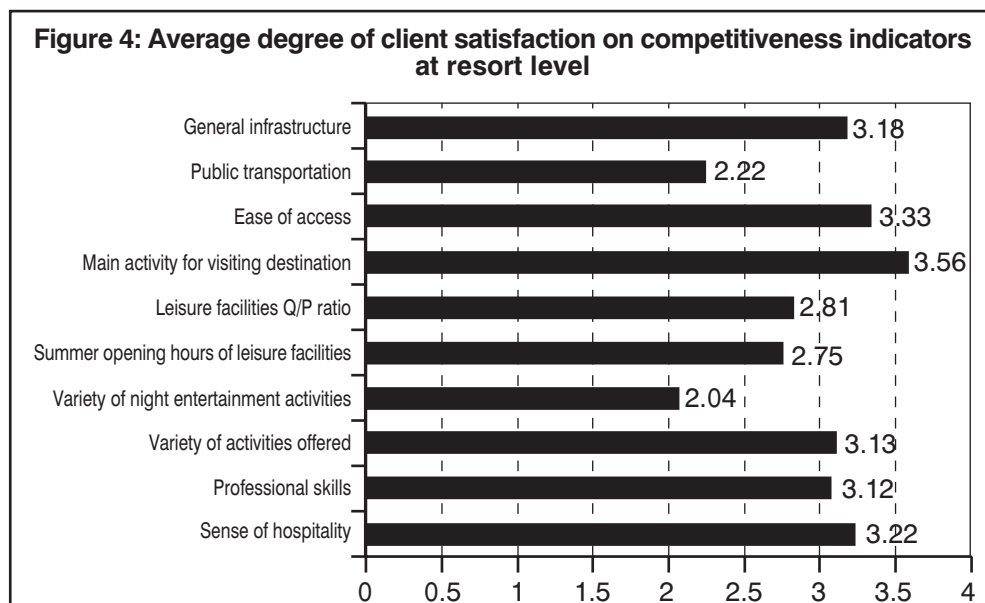
Impact of previous winter visits on tourist hotel satisfaction

Clear differences in satisfaction have appeared between tourists having already visited the destination in winter and those who have not. Variation in average satisfaction between the former and the total client sample is positive for all indicators, while it is negative between the latter and the total client sample.

Furthermore, a MANOVA analysis shows that whether or not tourists have visited the destination during the winter, they are nevertheless significantly more satisfied with the upper category hotels and significantly less satisfied with lower category ones. This observation confirms the performance gap between upper and lower category hotels.

TOURISTS' PERCEPTION OF RESORTS' COMPETITIVENESS

At the resort level, clients are less satisfied with the variety of night entertainment activities and public transportation, as shown below in Figure 4. Their satisfaction is also significantly lower in the case of summer opening hours and quality/price ratio of leisure facilities.



At the same time, tourists are most satisfied with two indicators relative to the well-being factor: main activities for the destination visited and ease of access to the former. As for the two latter indicators the analysis shows that there are no significant differences according to the different characteristics of clients.

Least/most satisfied clients

With reference to client characteristics, satisfaction levels are on average significantly lower across all the different competitiveness indicators for those travelling individually and those attending seminars.

Tourists travelling individually are the least satisfied for the three indicators concerning entertainment, while tourists attending seminars are less satisfied with public transportation, general infrastructure and summer opening hours covering leisure activities.

In addition, those clients who have not visited the destination in winter are generally less satisfied than those who have already been to that destination in winter for all competitiveness indicators, with the exception of public transportation.

Although not significantly higher than the average, it is interesting to note that clients who are relatively satisfied with all the different indicators of competitiveness have the following profile:

- With family;
- Stay between 5 and 6 nights;
- Practice sports and have family activities.

The high degree of satisfaction among families might be partly due to the hotel structure in Swiss Alpine destinations. Most hotel properties are family-owned which may create a favorable context for tourists coming with their respective families. In addition, the large range of sporting activities in Swiss Alpine destinations could be the reason for the relatively high degree of satisfaction among tourists practicing sports.

TOURISTS' PERCEPTION OF DESTINATIONS' COMPETITIVENESS

After having measured the tourists' satisfaction on the different competitiveness indicators considered at hotel and resort levels, and in order to reach a competitiveness score for each of the selected destinations, tourists were asked to weigh up competitiveness factors on the hotel as well as the resort level with a 1 to 4 scale.

Importance of competitiveness factors

Among the client sample, the importance of the competitiveness factors at the hotel level has been ranked on average as follows: Comfort (3.1); Q/P ratio (2.74); Entertainment (2.13)

and Welcome (2.03). The ranking of the four competitiveness factors at the resort level was similar: Well-being (2.99); Q/P ratio (2.66); Entertainment (2.39) and Welcome (1.96).

Destinations' scores

This section deals with the overall scores of the competitiveness factors calculated by multiplying the degree of satisfaction of clients with their respective importance attributed to the competitiveness factor.

According to table 2 (see below), the best performing destination is Adelboden (Oberland Bernois), followed by Klosters and Lenzerheide (Grisons). These destinations are successful at the hotel as well as at the resort level. In contrast, Wildhaus (Suisse Orientale) and Champéry (Valais) are the least performing destinations, even though not systematically at both benchmarking levels.

The entertainment factor has the highest score among the best performing destinations and the lowest score among the least performing ones. This is true at both benchmarking levels. It appears clearly when looking at destination scores in areas of Oberland Bernois and Grisons.

Destinations in the Oberland Bernois (such as Adelboden) show more or less the same scores of satisfaction for all competitiveness factors with the exception of the entertainment factor at hotel and resort levels, whereas Adelboden has a significantly higher score. Similarly, all destinations in Grisons (where both Klosters and Lenzerheide are located) receive similar scores for the four competitiveness factors at both benchmarking levels. The exception is the entertainment factor at hotel as well as resort level, for which client satisfaction in Klosters is significantly higher than the area average while it is significantly lower in Flims.

Concerning the performance of destinations in other areas, destinations in the Valais obtain similar scores for each competitiveness factor. However, a significantly higher score was obtained for Crans-Montana with comfort at the hotel level and well-being at resort level. Finally, in the Vaud area, despite the generally weak scores obtained by different destinations, the good score obtained by Les Diablerets with the welcome factor at both benchmarking levels is noteworthy.

Table 2: RANKING OF SWISS ALPINE RESORTS ACCORDING TO THEIR OVERALL SCORES ON COMPETITIVENESS FACTORS IN THE SUMMER SEASON

	Hotel welcome score	Hotel Entertainment score	Hotel Q/P ratio score	Hotel Comfort score	Hotel level score	Resort welcome score	Resort Entertainment score	Resort Q/P ratio score	Resort well-being score	Resort level score	Hotel+ Resort score	Final ranking
OBERLAND BERNOIS												
ADELBODEN	5.972	11.23	9.22	10.066	9.121	6.017	12.09	7.846	9.008	8.74	17.86	1
GRINDELWALD	4.95	5.602	9.592	8.652	7.199	4.112	5.932	9.694	7.67	6.852	14.05	15
GSTAAD	4.955	7.304	9.002	11.575	8.209	5.022	6.728	8.218	10.14	7.527	15.74	7
LENK												
(SIMMENTAL)	4.96	5.258	10.33	10.01	7.639	4.53	5.532	8.967	10.35	7.346	14.99	9
VAUD / LEMAN												
LES DIABLERETS	8.917	3.462	7.675	10.516	7.642	8.518	6.96	6.43	8.071	7.495	15.14	8
LEYSIN	6.505	5.431	6.013	8.63	6.645	6.395	5.369	6.664	8.383	6.703	13.35	18
VILLARS	6.81	5.249	6.82	11.445	7.581	6.18	4.406	6.217	10.83	6.909	14.49	13
LES GRISON												
AROSA	6.381	6.636	8.175	9.479	7.668	5.703	7.262	9.209	10.34	8.129	15.8	6
DAVOS	4.592	6.246	9.235	11.945	8.005	4.546	7.791	9.074	10.2	7.903	15.91	5
FLIMS	6.852	3.337	8.47	11.108	7.442	6.462	3.254	6.551	9.581	6.462	13.9	16
KLOSTERS	6.38	10.01	9.182	7.511	8.27	6.566	11.03	7.211	8.194	8.251	16.52	2
LENZERHEIDE	5.411	7.488	9.289	10.009	8.049	4.307	8.795	8.694	10.21	8	16.05	3
SMORITZ	5.784	5.702	8.694	11.384	7.891	5.132	5.986	8.817	8.108	7.011	14.9	11
SUISSE ORIENTALE												
WILDHAUS	7.608	5.225	5.226	9.703	6.94	6.322	4.85	5.802	6.392	5.841	12.78	20
LE VALAIS												
CHAMPERY	6.93	2.504	5.074	11.211	6.43	7.345	4.45	5.833	9.028	6.664	13.09	19
CRANS MONTANA	10.34	3.261	8.02	10.19	7.953	9.807	7.823	7	7.645	8.069	16.02	4
LEUKERBAD	8.852	3.211	7.045	11.085	7.548	8.303	5.515	6.764	8.361	7.236	14.78	12
SAAZ FEE	6.78	3.398	7.585	12.293	7.514	6.528	5.147	6.893	11.17	7.433	14.95	10
VERBIER	7.462	3.412	5.93	11.138	6.985	6.665	4.728	6.533	8.907	6.708	13.69	17
ZERMATT	6.117	3.632	7.866	10.177	6.948	5.589	5.382	6.763	10.77	7.125	14.07	14

Areas' scores

Score analysis shows that the most appreciated Alpine area in the summer is Oberland Bernois, followed in sequence by Grisons, Valais, Vaud/Léman and Suisse Orientale. Nevertheless, this ranking is not always found when considering each competitiveness factor individually.

The two best performing Alpine areas, Oberland Bernois and Grisons, have a significantly high score for two factors which are quality/price ratio and entertainment at both benchmarking levels. However, they suffer at the same time from a bad score for the welcome factor. This is especially true for Oberland Bernois.

The least performing destination is Suisse Orientale. The main weaknesses are the quality/price ratio at the hotel level and entertainment, quality/price ratio and well-being at the resort level. It is also interesting to observe that Valais performs particularly badly for entertainment factor at the hotel level, while together with the Vaud area demonstrating a stronger performance on the welcome at the hotel as well as resort level.

It is to note again that the entertainment factor discriminates best performing areas from least performing ones, but here only at the hotel level.

CONCLUSIONS AND RECOMMENDATIONS

In Swiss Alpine destinations, at the hotel level client satisfaction is the highest on average for the sense of hospitality and comfort in the summer season. The most satisfied clients are those older than 60 who already visited the destination in winter. Moreover, clients staying in 4 and 5-star hotels are generally much more satisfied than the others, while 1- and 2-star hotel clients are much less satisfied on the different competitiveness indicators with the exception of the room quality/price ratio. Concerning the latter, only 3-star hotel clients show dissatisfaction. Thus, in order to better meet client expectations in summer season lower-segment hotels need to make tremendous efforts on issues dealing with welcome, entertainment, comfort as well as on extra expenses quality/price ratio. Concerning 3-star hotels, a focus on a stronger control and management of room service quality, as well as on price levels closer to what clients are ready to pay, are required.

At the resort level, main activity for the destination visited and ease of access to the former are the most satisfied indicators, while families staying between 5 and 6 nights, practicing sports and having family activities are amongst the most satisfied clients.

In addition, the analysis finds issues dealing with variety of entertainment activities among the most dissatisfactory indicators: variety of leisure activities at hotel level and variety of night entertainment activities as well as summer opening hours of leisure activities at resort level. Moreover, when considering the overall scores on competitiveness factors obtained by the destinations, the entertainment factor at both levels has the highest score among the

best performing destinations, while it has the lowest score among the least performing ones. Thus, in order to better meet expectations from tourists in summer season the variety of entertainment activities needs to be increased in Swiss Alpine destinations, with the exception of those situated in the best performing areas of Oberland Bernois and Grisons. To that purpose, cooperation among tourism actors in a destination, as well as between different destinations, could be essential in developing a diversified offer of entertainment activities able to satisfy tourists.

In more general terms, none of the different categories of clients (by age, socio-professional category, etc.) at hotel and resort levels is significantly satisfied with all competitiveness factors and indicators. Similar results were obtained when considering the respective performances of hotels, resorts and destinations. This presents a general problem of client segmentation and inadequate tourism supply for client needs in the summer season. On that basis a clear strategy should be identified by hotels, in association with the aims of other local and regional tourism actors, with respect to the clients to be targeted, with clear implications for its marketing and distribution policy.

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Organic Images of Finland in European Markets

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ABSTRACT:

The objective of this study was to examine spontaneous destination images of Finland in the seven main marketing areas of the Finnish Tourist Board in Europe. This study also aimed to find potential differences in destination images between different countries of origin and to chart the existing positive images. The study is based on 2001 personal interviews. The images of Finland represented in this report represent a generally prevailing image of Finland in the country in question. Nature is a strong though not overwhelming element in the image of Finland in continental Europe, both for those who have visited Finland and those who have not. Swedes and Russians, however, perceive Finland more as a country of people, life, culture and various places to visit. Images of Finland vary even between continental European countries. The image of Finland as a cold, northern, snowy winter destination is most common in France. Germans most often mentioned lakes and forests. As a whole, winter elements are associated with Finland more often than summer elements (e.g. the midnight sun). In addition to nature, especially those who have visited Finland often mention Finnish people and hospitality, too.

Key words: destination image, organic image, image of Finland

INTRODUCTION

Tourists' destination image has been one of the most frequently investigated topics studied by tourism researchers during the last decades. According to Gartner (2000) image is believed to be the key underlying factor influencing traveller's choice of destinations. Destination marketers are using several attempts to promote image. The aim of image promotion is that target group receives the message been sent and as a result changes buying behaviour. (Ashworth and Voogd 1990). The most receptive target markets in short term are the travellers with more positive images, since they are most likely to visit the area (Leisen 2001). It is anyway also important to find out negative or wrong mental images among the target group to identify the possible barriers for travelling to a destination. Especially destinations attempting to expand their markets should pay extra attention to non-visitors and their mental images. (Baloglu and McCleary 1999b).

According to Baloglu and McCleary (1999b) a particular research stream investigated the impact of previous visitation (actual behavior) or familiarity on destination image (Gunn

1972, Ahmed 1991; Fakeye and Crompton 1991; Hu and Ritchie 1993). Some studies examined the relationship between tourists' geographical location (distance) and image (Ahmed 1991; Fakeye and Crompton 1991). Others focused on the measurement of destination image (Echtner and Ritchie 1993), its components (MacKay and Fesenmaier 1997), or factors influencing it (Baloglu and Brinberg 1997; Walmsley and Jenkins 1993).

Others have examined temporal influences on image change (Gartner and Hunt 1987), differences between tourist image and what is projected by destinations (Stabler 1990), and the relationship between sociodemographic variables and destination image (Baloglu 1997; Walmsley and Jenkins 1993). Baloglu and McCleary (1999b) stated however, that little empirical research has focused on how image is actually formed, especially in the absence of previous experience with a destination.

According to Suh and Gartner (2004) one question that arises when using image analysis to determine destination attribute preference is the influence of culture. Are we dealing with "global tribes" of people who may be geographically dispersed but retain a strong sense of cultural identity, or do different nationalities demand essentially the same touristic products?

The purpose of this study was to investigate if there are differences in the organic image of Finland between nationalities in seven target markets in Europe.

IMAGE FORMATION PROCESS

A common definition for image is that it is a set of beliefs, ideas and impressions that people have of a place (Kotler et al. 1993). In recent times, the emphasis on destination image has shifted from establishing its importance to different styles of image measurement to examining the image formation process (Suh and Gartner 2004). Goodall (1990) stated that knowing influencing factors would help to identify target markets and decide which image should be promoted to which segment of the market.

Baloglu and McCleary (1999a) suggested that destination images have cognitive, affective and global parts and they are formulated by stimulus and personal factors. From personal factors age and education are very important factors in formulating the image. Stimulus factors (information sources, distribution and most importantly previous experiences of destination) are also affecting the image formation. The former are those that stem from the external stimulus and physical object as well as previous experience. Personal factors, on the other hand, are the characteristics (social and psychological) of the perceiver. (Baloglu and McCleary 1999a). Familiarity with a destination has appeared to be a significant determinant of the destination image (Baloglu 2001).

Age and education appear to be major personal determinants of an image (Baloglu and McCleary 1999a). Baloglu (1997) examined image variations of the United States based on sociodemographic characteristics of West German tourists. Few image differences were

found due to age, marital status, and occupation. However, age was the most significant sociodemographic variable. On the other hand, the image of a destination is highly related to touristic benefits sought (motivations) (Baloglu and McCleary 1999a).

Gunn (1972) proposed that tourists' destination image is distinguished by two different dimensions: organic image, which is a potential tourist's impression of a destination without having visited a place, and induced image, which is formed by promotional materials or actual visitation to the area. Fakeye and Crompton (1991) modified Gunn's theory and added to the list a complex image, which is a much more realistic, objective and differentiated image. Their model described tourists developing organic images of a set of alternative destinations from various non-tourism information sources. With the desire to travel, they may get involved in an active information search and resort to specific information sources. As a result, they develop induced images of alternative choices which may be the same as, or substantially different from, their organic images.

According to Selby and Morgan (1996) this comparison of the destination's image at different stages in the tourist's decision-making process has been an important development in place image theory. At each stage the potential tourist may hold different images of a destination, images, which are constructed by the amount, source and objectivity of the available information. Official tourist organizations are responsible for the projected image whilst the organic image may be said to derive from non-tourist sources. Thus, projected images include commercial sources such as guidebooks and advertisements, and organic sources include popular culture, the media, literature and education. There may be significant discrepancies between the naive image, consisting of the organic and projected image, and the re-evaluated image upon visiting the destination, which includes the perceptions of the product itself. (Selby and Morgan 1996).

Most studies have largely focused on image's static structure by examining the relationship between image and behaviour, but not on its dynamic nature by investigating the influences on its structure and formation in the absence of actual visitation. The initial image formation stage before the trip is the most important phase in tourists' destination selection processes (Gunn 1972).

CROSS-CULTURAL IMAGES

Image formation and evaluation have not typically been investigated from a cross-cultural perspective. In tourism, the focus is more likely to be on segmentation of international travel markets. (Mackay and Fesenmaier 2000). Cross-cultural research implies identifying differences or similarities between cultures. According to Pizam (Reisinger et al. 2003) finding that two nationalities groupings do not differ is as important as finding that they do. Some marketers assume that traditional barriers between cultures will disappear, and the coming global village will be a homogenous market without cultural boundaries. Hence, focusing on differences maybe ineffective. According to Reisinger this assumption is faulty. She argues that first, dominant cultures consist of subcultures based on race, ethnicity,

geographic region or economic or social class. Second, people can be members of several subcultures. Third, there are degrees of cultural differences. Marketers can focus on extreme cultural differences, as between Western and Asian cultures, or subculture differences, for example American and British tourists. Finally, today's tourism culture is homogenising and standardising major destinations, which are losing their uniqueness and local identity. (Reisinger et al. 2003).

Dimanche argues, that although we see customisation, some tourism operators may still be looking for the culturally unique product. For example some leading tourism operators may look at cultural similarities and wonder about possibilities of marketing of single tourism product that can be sold across Europe. However, any destination marketer would confirm that the respective behaviours of British, German, French or Italian tourists are different. So focusing on similarities has limitations. (Reisinger et al 2003). For example identification differences in tourist behaviour, pre-purchase travel needs formation, information search and learning are very important. (Reisinger et al. 2003).

Cross-cultural studies show that not all tourists are alike. Several researchers (Reisinger, Dimanche, Pizam 2003) argue that cultural profiling is very valuable for segmenting, targeting and positioning. It helps at developing promotional strategies aimed at specific segments. Nevertheless, according to Dimanche (Reisinger et al. 2003) it should not be seen, in international context, as "just another way of segmenting", because culture itself does influence values, lifestyles and behaviour. Pizam argues, that culture is a higher order variable that comes before demographic and other lifestyle variables. (Reisinger et al. 2003).

According to Weiermair (2000) an important vein of cultural analysis is found in international marketing literature (e.g Usunier, 1993), where culture and cultural differences are attributed to having an important influence in explaining customer behaviour and in helping to design effective marketing strategies and tools. One research field is concerned with the construct of national cultures and their variations across the globe. Pikkemaat and Weiermair (1999) argue that tourists' expectations of specific levels of service quality in tourism partly stem from their own culture and prior socialisation, which can predispose them to interpret factors influencing tourism destination choice and destination experience from a distinctive perspective.

Weiermair (2000) stated that one's cultural belonging and heritage does not only affect the way in which one experiences and interprets goods and services supplied to customers in tourism, but it is also likely to influence decisions regarding choices of vacations and destinations. He mentioned that there are very few studies, which have explicitly used culture as an explanatory variable in predicting vacation or destination choice (e.g. Sheldon and Fox 1988). Instead, most studies have used nationality as a proxy for culture (Pizam and Sussmann 1995).

A prime finding of 4_s and Gartner's (2003) study of perceptions in international urban tourism in South-Korea is that different nationalities evaluate attributes of destination

products differently. But whether that difference is due to cultural affiliation or some other factors, remains an open question. Accepting that culture is a strong factor in destination choice, or at least in the types of attributes sought at a destination, there should therefore be discernable differences in how visitors from different nations evaluate and use urban tourism attributes. (Suh and Gartner 2004). Mackay and Fesenmaier (2000) examined cross-cultural image perception based on visual stimuli and their results showed that different cultures (US and Taiwan) have different aesthetic tastes. However, according to Dimanche any destination marketer would confirm that the respective behaviours of even British, German, French or Italian tourists are different. (Reisinger et al. 2003).

Some literature, e.g. Reisinger and Turner (2002) suggest that different nationalities react differently, based on cultural affiliation, with respect to demand for goods and services. In this study we have accepted the Kluckhohn's (see Reisinger et al. 2003) description of national cultures as a theory-in-use –type definition for explaining differences in behaviours between nationalities. By national culture we understand here the patterned ways of thinking, feeling and reacting that people from a certain nationality may have.

MEASURING DESTINATION IMAGE

Apart from defining the complexity of destination image tourism scholars have been interested in developing methods for measuring the destination image. The most common measurement technique presents respondents with number of possible destination attributes and asks them to evaluate those attributes on a Likert type scale that is anchored by a pair of bi-polar adjectives. Data collected using Likert type scales was later used with wide variety of analytical techniques to uncover tourist images of a particular place. However, while scale measurement allows for the evaluation of specific attributes, it normally does not provide for a comprehensive evaluation of all potential attributes important for tourism development within a destination area. (Suh and Gartner 2004)

Echtner and Ritchie (1993) suggested that a combination of structured and unstructured methodologies is necessary to measure for example country image. According to them destination image should be envisioned as having two main components: those that are attribute-based and those that are holistic. Each of these components contains functional (or more tangible) and psychological (ore more abstract) characteristics. Furthermore, images of destinations can also range from those based on common functional and psychological traits to those based on more distinctive and psychological traits to/or those based on more distinctive or even unique features, events or feelings. Attributes containing functional characteristics include tourist activities, historic sites, entertainment and transportation, while psychological attributes involve hospitality, atmosphere, reputation, opportunity to increase knowledge and quality of service.

In general, multivariate techniques predominate because they allow for determination of the latent multidimensional structure of the destination image, as well as average scoring as a numeric instrumentalisation of image. (Gallarza et al, 2002). Assessing tourists' image

of places two kinds of attributes have been frequently used: designative attributes (measuring perceptual and cognitive component of image) and evaluative attributes (measuring affective component of image). (e.g. Baloglu and McCleary 1999a)

Unstructured and qualitative methods have been far less frequently used than structured methods like multidimensional scaling analysis. (Gallarza et al. 2002). That is often due to need of large samples. To achieve more deep knowledge from images and attitudes concerning destination it is essential to use unstructured, open-ended questions, too (Echtner and Ritchie 1993). Jenkins (1999) argued that to provide valid image research, a preliminary phase of qualitative research is important in order to distil the constructs relevant to the population being studied.

Free elicitation, in the form of word-association, has been used widely in the field of marketing research. The main advantages of free elicitation for destination image research are that it allows the respondent to describe the target stimulus in terms that are salient to the individual, rather than responding to the researchers' predetermined image dimensions. Another advantage is that it will measure whether the image of destination is lacking or weak, that is, if respondents are unable to provide responses. Free elicitation offers a spontaneous "window" on the image held by tourists. The lack of in-depth processing shown by the rapid reaction times and the high frequency of particular responses on free elicitation tasks indicate that this technique draws out parts of the easy-to-access stereotypical image. (Jenkins 1999).

RESEARCH METHOD

The objective of this study was to examine spontaneous destination images of Finland in the main European marketing areas of the Finnish Tourist Board. This study also aimed to find potential differences in destination images between different countries of origin and to chart the existing positive images. This study is based on 2001 interviews compiled in Great Britain (339), Russia (400), the Netherlands (252), Sweden (231), Germany (338), Italy (190) and France (242) between July and November in 2002. The target group consisted of men and women over the age of 15. The interviews were conducted in the native language of each country.

The interviewers included 7 Finnish students in the final stages of their master's degree and some doctoral students. This method was chosen mainly due to financial reasons. Phone interviews in each country were considered as an alternative method, as were personal interviews organised through universities in each country, but both these alternatives had to be discarded: phone interviews would have been too expensive compared with the expected benefits, whereas the practical organisation needed for the second alternative would have required too much time.

The interviews in each country took place in several cities, which were chosen together with representatives of the Finnish Tourist Board. These cities were situated in different parts of the country in question, all of which were considered important as the source area for

potential tourists to Finland. Some areas from which there was less travel to Finland, or which were seen as potential future source areas, were also included in the study. It must be noted that the city where the interview took place may not have been the city of residence of the respondent. This was a commissioned study, which means that the total number of the interviewees was settled beforehand with the Finnish Tourist Board. Hence, the study was geared according to the available budget. As the research results were meant to be used to guide marketing communications, and the objective was mainly to chart general guidelines, statistically representative numbers of interviews were not even aimed at.

The interviews took place in promenades, parks and shopping centres, where the interviewees were selected by random selection. However, special attention was paid to ensure an equal representation of different age groups of both men and women in the selection. The willingness of the respondents to answer varied somewhat in different countries, and overall it proved to be surprisingly difficult to find interviewees willing to take part in the study. The first question in the interview situation ensured the fact that the interviewee lived in the target country. The respondents were also asked to say how often they have been to Finland, and whether they could imagine travelling to Finland. Finally, the sex, age and level of education of the respondents were recorded.

The free elicitation method was used. The images of Finland were investigated with an open ended question "When you hear the word "Finland", what does it bring to your mind?". The first, second, third etc. word and sentence associations were registered. The next question was "How would you describe Finland as a tourist destination?". The first association was separated from the ensuing associations.

The interviewers first recorded the data for each country as Excel files. The associations of the respondents were written down as such. Each interviewer recorded the first associations to both questions on their own frequency tables, which indicated the most common associations of the respondents. After this, the first three associations of the questions were categorized according to whether the associations belonged to functional or psychological issues. This classification was based on Echtner & Ritchie's (1993) model of image formulation of a tourist destination, from which a model for classification was created for this study.

At the next stage, the entire data was transferred to the SPSS programme with which comparisons between different countries were made and the effect of the background variables on the spontaneous images were further studied. As methods of analysis, interpretations of direct distributions and cross-tabulations, and in some cases the chi square test were used. However, the results of this study are only descriptive, as the number of interviews is insufficient in relation to the size of the whole population in each country.

The answers to "what comes to your mind when you hear the word Finland?" were divided into 131 categories. Correspondingly, the answers to "what kind of an image do you have of Finland as a tourist destination?" were divided into 150 categories. There was an abundance of different words and expressions and this classification condensed the contents of the

associations whilst at the same time maintaining their diversity. The emphasis on matters related to nature or people in the answers to both questions of each respondent was assessed. The background for this classification was gleaned from Lew's categorization of the dimension of the tourism attraction from 1987.

RESULTS

In the light of the whole data, the general European image of Finland, which can also be referred to with the term organic European image, is nature oriented, with a concentration on winter conditions and the northerly location. The most common association mentioned is cold, which is particularly emphasised in the answers of the French and Dutch respondents. Swedish respondents do not mention the coldness at all.

Finland remains to be a fairly unknown country: 6 % of all respondents were at first unable to give any kind of an association of Finland. Finland is known best in the neighbouring countries Russia and Sweden, as well as by those who live in France, and the least known in Great Britain and Italy. Swedes and Russians have also visited Finland most often, the fewest people to have visited Finland were amongst the French respondents.

Those who have visited Finland have most often been to Helsinki but also e.g. in Lapland. The images of the Finland-visitors differ from the images of non-visitors. A visit to Finland means the formation of a more detailed image. Instead of the cold, the most common images in the whole data are sauna, lakes, forests and friends, but coldness is also mentioned as the fifth most common image.

In the neighbouring country Sweden, the images are more concrete, more related to culture and people. The most common images mentioned are sauna and friends. This is partly due to personal experiences. In Russia, the image of Finland is more sporadic, on the one hand, the five most common associations mentioned include the concrete Santa Claus, but on the other hand, the cold and the north, which are related to nature, are mentioned.

Only 19 % of the whole data said that they could not even imagine travelling to Finland. They gave more negative evaluations than those who could imagine to travel to Finland. Even though the number of positive answers equals 81 % of all interviewees, it is still worth noting that only a small part of them in fact are potential tourists: the answers included plenty of "why not" –type answers and Finland, overall, was not thought of as a holiday destination. The Dutch and British respondents gave the clearest negative answers.

It was hard for the respondents to describe Finland as a tourist destination. There were many "nothing" responses (13 %) and a lot of incomplete information (5 %). Different kinds of positive adjectives were generally used, which may reflect both a real image as well as an unspecified one. Especially in France and in the Netherlands, the image of Finland as a tourist destination is nature-oriented and emphasises winter travel. The Swedish and Russian images are twofold to say the least, emphasising on the one hand nature and then culture

on the other hand. The Russian images include the most activities, such as water-parks and skiing. The British, Germans and the Italians have the most unclear image of Finland as a tourist destination. They use plenty of adjectives in their answers.

Functional expressions related to nature have often been used when describing both the general image of Finland and the image of Finland as a tourist destination. Hence, more concrete than abstract properties are associated with Finland: the environment and the related activities, and, particularly with the Swedes and Russians, also built sites control the image of Finland both in general and with respect to tourism. Psychological properties, such as expressions related to culture, history, the nature of the region or its atmosphere and customs are a minority. Russians, in particular, mention psychological factors the most.

In general, the most common positive adjectives about Finland are good, nice, exotic, hospitable and friendly. Finland as a tourist destination conjures adjectives such as good, pleasant, nice, wonderful, exciting, easy-going, beautiful (nature), hospitable, friendly and original/authentic. It seems that those who have visited Finland used more positive adjectives than those who have not.

Tourists from Italy, Netherlands, Sweden and Germany travel to Finland mostly in the summer time (Statistics Finland 2002). Even so, the cold and the snow are emphasised in the images of these countries, excluding the Swedish respondents. The images of the Dutch respondents have year-round elements. People from Russia, Great Britain and France travel to Finland mostly in winter (Statistics Finland 2002), hence their images of the cold and nature are understandable. Skiing and water-parks are also apparent in the Russian answers as winter activities. The strengthening image of winter tourism for the French was apparent in the fact that they did not always consider the cold to be a negative element. Comparative summary of images of Finland is presented in table 1.

Table 1. A summary of images of Finland in seven main tourism markets in Europe

	General image	Image as a travel destination
Russia	Diverse. Various associations. Both nature-related and people-related elements: snow, positive evaluations of people, forests, lakes, cold, Santa Claus, mountains and hills etc., but emphasis on people, life and culture.	Diverse. Various associations, but emphasis on people, activities and culture. Common associations: water parks, skiing, nature, Helsinki, lakes, forests, historical sights etc.
Sweden	Strong emphasis on people, life and culture. Common associations: sauna, ferries to Finland, friends, sports, alcohol, lakes, forests etc.	Emphasis on people and culture. Common associations: Helsinki, ferries to Finland, culture etc. Some Swedes, however, emphasise nature. Not all Swedes have a clear picture of Finland as a travel destination.
Germany	Emphases on nature but also other elements are mentioned. Common associations: lakes, forests, cold, snow, animals etc.	Associations rather general but mostly positive or showing uncertainty: beautiful, interesting, not any associations, has not visited. Also nature related associations: nature, cold, lakes.
Britain	Diverse. Common associations include both nature-related and people-related elements: cold, snow, forests, Scandinavia, alcohol, sports, lakes, friends etc.	Non-structured and vague. Both positive and negative associations: cold, beautiful, interesting, expensive, would like to visit, would not like to visit. Also uncertainty: not any associations, has not visited.
France	Winter and northern location prominent, but also other elements are mentioned. The most frequently mentioned association: cold. Other common associations: snow, reindeer, Scandinavia etc.	More diverse than the general image, but emphasis is on nature and winter. Common associations: cold, nature, snow, skiing, winter tourism, winter, escaping, landscape.
The Netherlands	Emphases on nature but also other elements are mentioned. Common associations: cold, lakes, nature forests, Scandinavia, beautiful etc.	Emphasis on nature. Common associations: nature, peacefulness, beautiful, cold, space, hiking etc.
Italy	Emphases on northern location and nature but also other elements are mentioned. Common associations: cold, snow, reindeer, Santa Claus, forests, Scandinavia, north, beautiful etc.	More homogeneous than in other countries but non-structured. Common associations rather general or showing uncertainty: beautiful, interesting, cold, nature, not any associations, has not visited.

CONCLUSIONS

Developing and changing images of a place is a difficult process for the marketers. Part of the process is to research what outsiders identify as the true and strong elements of the place. (Day et al. 2002) The purpose of this study was to investigate the organic images of Finland. One of the targets was to find out the existing positive images, which could be then strengthened by marketing communication. Positive images have a positive influence in destination choice and the negative images may be obstacles to travelling to a destination. In a state of high competition among destinations, marketers must identify the mental images held by potential travellers and select those segments that represent the most receptive target markets.

The images of Finland presented in this report do not merely represent those who are potentially going to travel to Finland, but reflect, rather, some sort of a generally prevailing image of Finland in the country in question, except Sweden. This may be assumed to be very close to that organic image of Finland, which prevails in these countries. The organic image which the respondents have before the visit, and which is reflected in the spontaneous images whether they be positive or negative, is one of the most important factors that affect a decision to travel.

The Swedish respondents have travelled to Finland so much (see e.g. Statistics Finland 2002) that with them it is no longer possible to talk about the organic image even at a general level. Instead, it is mostly a question of image based on personal experience. Finland's position as Sweden's neighbour may also affect the fact that there is plenty of factual information on Finland in both textbooks and the media. Therefore, Finland is known as a neighbour but less known as a tourist destination.

The formation of the organic image is influenced by, for example, the matters learnt at school and information and marketing messages offered by the media. The way in which this information is filtered and what the image becomes is naturally dependent on each person's own attitudes and interests. If a person, for example, only wants to travel to beach resorts, he or she may not even be willing to receive information whose content does not fulfil these needs. Further interpretations of the findings of this research will require more detailed information on the general travel behaviour in the researched countries.

Lack of knowledge of the destination's appeal from potential visitors' perspectives is an impediment to development and implementation of a strategic view of destination's image. (Laws et al. 2002). It was apparent in the answers of all nationalities that Finland is not known or thought of as a tourist destination. This might suggest that there is not a great deal of available information about Finnish tourism offering, but maybe even more important reason is the lacking motivation for holidays in a destination with the northern kind of attractiveness. Ignorance would also seem to lead more often to negative associations in relation to tourism, for example emphasising the cold weather, which is a challenge to marketing. Summer in Finland also seems to be a fairly unknown concept amongst the general public.

Nature is a strong though not overwhelming element in the image of Finland in continental Europe, both for those who have visited Finland and those who have not. Swedes and Russians, however, perceive Finland more as a country of people, life, culture and various places to visit. Images of Finland vary even between continental European countries. The image of Finland as a cold, northern, snowy winter destination is most common in France. Germans most often mentioned lakes and forests. As a whole, winter elements are associated with Finland more often than summer elements (e.g. the midnight sun). From the marketing point of view the Finnish image should be sharpened for the European market in each country, so as to differentiate and position clearly in relation to other Scandinavian countries.

Apart from the country of residence, the significance of demographic background factors in relation to images could not be determined in this study. The level of education seemed to have the clearest significance in such a way that those with a lower level of education seemed to have less knowledge of Finland. There were, however, no great differences. Nevertheless, it must be noted that because of the structure of the data (the size of the sample was not comparable in respective countries) no reliable statistic analysis was possible in this case.

Despite the nature-orientation of the answers, it would be useful to also take into account factors related to people and the way of life in tourism marketing and to emphasise the positive and already known properties, such as hospitality. This factor is also emphasised by Ilola and Aho (2003) in their research on "What is best in Finland" based on boarder interviews of foreign tourists at the time of their leave from Finland. Tuohino's research on the visual communication in tourism marketing has discovered that a lack of people and activity in the visual communication isolates the target of the message even with a beautiful scenery. The viewer does not feel as if s/he is an active participant within the scenery. In visual communication, scenery and buildings are emphasised, whereas the potential travellers from Germany and Italy would like to see what they could do inside the scenery. (see e.g. Tuohino and Pitkänen 2003).

DISCUSSION

As the data compiled for this study is not statistically representative due to financial reasons, there may, with good reason, be criticism as to whether the results can be considered reliable. If singular associations and their proportional emergence in each country are examined, or if the data of singular associations of different countries are compared against each other, the criticism is, no doubt, well-founded. However, as the associations in the final results are classified under rough categories and the data has been summarised under only a few themes, it may be noted that, from the point of view of building a national message for marketing purposes, the accuracy should be adequate.

After the completion of the study, its validity and reliability were tested by interviewing researchers of tourism marketing and those working within tourism businesses in the target country of the study. These experts were asked to "please comment on the main findings

of the summary about the general image of Finland and the tourist image” in a more comprehensive interview which complemented this study (Tuohino et al 2004). Each of the 34 interviewed experts considered the research results to be quite reliable and valid from the point of view of their own country at the level described in the Conclusion (see table 1).

The mental images of Finland presented in the results of this study mainly represent an organic image. From a marketing communications point of view, it is crucial to know how potential travellers have reacted to promotion and what kind of awareness they have of an area as a tourist destination. For future research, it would be interesting to investigate if the image portrayed by tourism marketing has influenced these images, that is, to what extent the results of the research reflect the so-called projected image and if they possibly also represent the naive image, not only the organic one. In any case, the data of this study mainly involves the images created by those who had never been to Finland, excluding the Swedish respondents, the majority of whom had been to Finland at least once.

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Adapting to Change: Maintaining a Wilderness Experience in a Popular Tourist Destination

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ABSTRACT

Wildernesses are supposed to offer “primitive” forms of recreation, opportunities to experience solitude as well as for finding freedom away from the constraints of urban living. However, as wilderness areas become known as tourist destinations, maintaining these conditions becomes increasingly difficult. The concept of tourism carrying capacity has been used for assessing the impacts of tourism on environmental and social factors, although it has been criticized for being subjective and vague. This study was conducted to assess the relevance of the concept as a tool for managing tourism in a sustainable manner, focusing on wilderness experience in Iceland. The study was carried out with 550 questionnaires and 12 in-depth interviews. The results imply that tourist satisfaction is high, although 20% of the visitors complained about crowding. Most visitors experienced the area as wilderness despite various facilities. The study revealed a contradiction in that tourists seek “unspoiled” wilderness, but at the same time they want good basic services and infrastructure.

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6 keywords:

Wilderness experience, tourism carrying capacity, tourist satisfaction, infrastructure, Iceland, Landmannalaugar.

INTRODUCTION

The largest part of the Icelandic Highlands can be defined as wilderness, that is to say relatively unspoiled areas. The Highlands have increasingly become popular as a tourist destination, an area where tourists escape the complexity of modern life, experience the authentic and primitive, and strengthen body, mind, and spirit (Saethorsdottir, 1998).

The Highlands cover about 40% of Iceland. Parts of the Highlands are very remote, but other parts have been made relatively accessible by road. One of the more accessible wilderness areas is Landmannalaugar, a colourful volcanic landscape about 200 km from Reykjavik. According to the Icelandic Tourist Board (2002), one third of all foreign visitors who come to Iceland visit Landmannalaugar and it is by far the most popular tourist destination in the Highlands. In response to increased tourism a variety of facilities have been built there to provide services and comforts. As tourism is dependent on a viable infrastructure and only a limited number of visitors can visit an area simultaneously in order to provide the experience of solitude, it is a difficult task to maintain the image of wilderness in a popular tourist destination.

In this paper I attempt to sort out this contradiction between the attraction of a wilderness based on the image of “unspoiled” nature, and the fact that visitors inevitably spoil the wilderness. For this I will use the concept of tourism carrying capacity, but emphasizing the experience from the tourists’ point of view. First I argue that the concept provides an important framework for tourist destination management. Then I describe what characterizes tourism in Landmannalaugar and discuss whether the growth of tourism there is restricted in any way, leading to an evaluation of whether the area does indeed provide a wilderness experience and whether increased tourism prevents tourists from enjoying the wilderness aspects. Finally conclusions are drawn as to what infrastructure can be built in the Highlands without destroying the experience tourists seek.

TOURISM CARRYING CAPACITY

Carrying capacity is a concept, which has for a long time been used in wilderness management. It deals with the ecological and social impacts of increasing recreational use and considers management objectives and value judgments. However, it has not provided a simple answer to the question of how many tourists can use a wilderness without destroying its quality (Hendee et al., 1990).

One of the difficulties in establishing suitable capacities for an area is that people perceive areas differently (Schreyer, 1976). When it comes to people’s perception of wilderness there is therefore no common agreement on what wilderness is. Wilderness is a state of mind based on people’s values, attitudes, experience and needs (Nash, 1982; Stankey and Schreyer, 1987; Cronnon, 1996; Macnaghten and Urry (1998). In other words, whether a particular experience of a place is wilderness or not is a highly subjective matter.

In order to understand the nature of a wilderness experience scientists have used many different approaches (Mannell and Iso-Ahola, 1987; Williams, 1989). One way to understand the nature of people's wilderness experience is to ask tourists what characterizes wilderness. This has been done in various ways (see, e.g., Stankey and Schreyer, 1987 for an overview). Some researchers have used the so-called Purist scale in their research on wilderness experience (e.g., Hendee et al., 1968; Stankey, 1973; Wallsten, 1988; Vistad, 1995). On the Purist scale the so-called 'purists' are at one end of the scale. They prefer to travel with primitive facilities in an unspoiled environment, highly appreciate solitude and dislike restrictions on their behaviour. 'Urbanists' are at the other end of the scale. They do not respond very strongly to environmental disturbances, and they appreciate a variety of services and facilities. Urbanists also welcome other visitors in the area they are travelling in. 'Neutralists' occupy the middle of the scale and do not have as strong opinions on those themes.

In other research the attention has been on satisfaction and its relationship to motivation and expectations (Williams 1991). Regarding a wilderness experience it is often claimed that satisfaction is reduced according to perceived crowding (e.g., Patterson and Hammitt, 1990, Williams et al., 1991; Manning et al., 1999; Lawson and Manning, 2001). Stankey and McCool (1984) have emphasized that if a site is perceived as a place with few tourists and the number of tourists turns out to be more than expected, the visitor is likely to be dissatisfied. People can also perceive crowding if they notice environmental damage, or if conflicts occur between users. Perceived crowding can cause some tourists to change their travel pattern, e.g., go to less crowded areas, or alternatively the quality of their experience is reduced (Kuss et al., 1990). When that occurs it can be said that the carrying capacity of the site, defined as the number of people who choose to go there, has been reached.

The concept of carrying capacity as a management tool has been criticized for being subjective and having unclear limits (Stankey & McCool, 1984; Manning, 1986; Lindberg, et al., 1997; McCool & Lime, 2001). It is necessary to evaluate both what are acceptable changes in the physical environment and what kind of experience an area should provide for the visitor. But who should decide what is acceptable? Should it be nature reserve managers, local residents, the tourist industry, scientists, politicians, NGOs or other interested parties? These groups can have very different views and it can be difficult to come to a common agreement. What makes it even harder to determine the carrying capacity is that with investments and infrastructure one can increase the tolerance of the natural environment, but at the same time affect the tourist experience.

To manage tourism in a sustainable manner one needs to decide what kind of tourism the area is intended for and what kind of experience is supposed to be offered. So in order to determine the carrying capacity one needs to have clear management objectives for the given area (Lime and Stankey, 1971).

Despite the limits of the concept it is useful as a framework to realize whether a wilderness area provides a wilderness experience to the visitors and whether tourism prevents them

from enjoying the wilderness. In this research tourist's satisfaction and expectations were analysed. Tourist's wilderness experience was studied and located on the Purist scale with the aim of understanding what kind of highland tourism is practised there.

THE LANDMANNALAUGAR WILDERNESS

During recent decades tourism has grown rapidly in Iceland. In 1980 66,000 foreign visitors visited the country but in 2003 the total had reached 320,000, well over the total population of Iceland of 290,000. Iceland has become a popular and fashionable tourist destination. In addition a few thousand Icelandic visitors visit the tourist sites. The natural environment is the most important attraction, as 76% of foreign visitors mention nature as the main reason for their visit to Iceland in the summertime (Icelandic Tourist Board, 2002).

Although travelling in the wilderness for pleasure was a 19th century phenomenon in North America and Europe, Icelanders did not really travel in the Highlands for the purpose of enjoying nature until the middle of the 20th century. Before that time people avoided the area as much as possible. The Highlands were characterized by harsh environment and extreme weather. Both because of the difficulty of travel and the belief that it was the home of outlaws, it was considered dangerous to travel there (Benediktsson, 2000).

Now travelling in the Highlands is fashionable. The fitness and health wave has inspired many to go on hiking trips in the mountains and warm, waterproof clothing and lightweight outdoor gear has made it much more comfortable to travel in the wilderness than before. A considerable number of Icelanders now own a four-wheel drive vehicle that can go over difficult terrain like glacial rivers and steep hills. Although parts of the Highlands are still very remote, other parts have been made relatively accessible by gravel roads. Approximately 13% of all Icelanders consider the Highlands to be the most exciting area in Iceland to visit and the same proportion stayed there overnight in 2003 (Icelandic Tourist Board, 2004). The Highlands also play an important part in attracting foreign visitors to the country. About 15% of the foreign visitors stay there overnight (Icelandic Tourist Board, 2002).

Landmannalaugar is located in the southern part of the Icelandic Highlands. It is by far the most popular tourist destination in the Highlands as one third of all foreign visitors who come to Iceland visit the area (Icelandic Tourist Board, 2002). The main attraction is the wild nature, volcanoes and lava formations, colourful mountains and geothermal areas with natural warm springs where one can bathe. The Icelandic Travel Association built the first mountain hut there in 1951. At that time the area was fairly isolated and getting there was a real adventure. One had to drive a few times through glacial rivers and over a rough landscape. In 1970 this completely changed as a two-kilometre road was built from the main mountain road to the area where the huts are, obviating the need to ford rivers and making the area much more accessible. In 1968 and 1978 the accessibility increased even more due to construction of hydroelectric power plants in southern Iceland. Now one can drive to Landmannalaugar in any vehicle, even an ordinary passenger car. This accessibility and the fact that it is only a three hour drive from the capital city of Reykjavik has had the important

effect of making Landmannalaugar the most visited Highland area in Iceland. Due to the popularity of the area the infrastructure has been improved many times, and now there are at least seven buildings, which include a sleeping hut, a shop and cafeteria in an old bus, a horse barn and recently built toilet facilities. Unfortunately, however, the tourist facilities at Landmannalaugar have not been designed to fit well into the natural environment and they lack a holistic design.

METHODS

During the high season, in the third week of July 2000, a questionnaire was handed out to visitors passing the mountain hut in Landmannalaugar. The sample consisted of 546 respondents and the response rate was about 95%. The questionnaire was in Icelandic, English, German and French and consisted of 32 questions. The aim was to explore the tourists' experience of the nature reserve as regards their desire for infrastructure and services and how the reality matched their expectations. The travel pattern in the area was also analysed. These quantitative methods have limitations. They give an indication of what looks to be common view but neither describe the individual experiences nor what thoughts and meanings lie behind the answers. In order to reduce the limitations and to obtain a deeper understanding of the wilderness experience twelve in-depth interviews were taken in the summer of 2003. The interviewees were selected so as to maximize the socio-demographic diversity measured by gender, age, nationality and mode of travel. Only tourists who had stayed overnight in the area were selected for an interview. Most of them had stayed two nights. The interview consisted of a few open-ended questions, which were intended to lead respondents to describe their experience, to see whether they would claim they had a wilderness experience and whether they thought it was a part of the area's attraction. The interviews, which lasted from one to two hours, were held in the nature warden's cabin and recorded.

It is unlikely that the three years that passed between the survey and the interviews made any noticeable difference to the results. The interviewers were the same. The conditions in the area had not changed regarding facilities and infrastructure. The number of visitors was very similar. Other conditions were considered to be comparable by the interviewers.

RESULTS

CHARACTERISTICS OF THE VISITORS

Of the 546 persons that answered the survey some 27% were from France, 17% from Germany, 14% were Icelandic and 10% of the visitors were from the Nordic countries. Most of the Icelanders that answered the survey came from the capital area. Women constituted 56% of the visitors, men 44%, and the average age of the visitors was almost 41. A little more than 80% of the travellers were visiting the area for the first time, while some 20% had visited it before. A majority of those that answered the survey, or some 83%, wanted to come back to Landmannalaugar, which showed that in general the visitors were impressed

with the area. Around two thirds of the visitors stayed overnight in the area and their average stay was 2.8 nights. Around one third of the visitors, on the other hand, were on a day trip and stopped on the average for 4 hours in the area. Most of the tourists travelled in buses, or a little more than 65%; 14% were travelling in private cars, 11% in rental cars, 7% came hiking from the surrounding area, and an occasional tourist had come by bicycle or motorcycle. A little more than half of the tourists at Landmannalaugar (56%) were in an organized tour, while a quarter of the tourists were travelling together, either with family or friends.

The tourists viewed the area as a trekking or hiking area, and more than 90% of them took the opportunity to walk around. On the average people spent some seven and a half hours trekking, though the range was large, from a half hour stroll up to a fifty hour trekking tour. Most of the trekkers stayed in the lava and the mountains next to the hut, but some people took the longer paths.

TOURIST OPINIONS OF INFRASTRUCTURE AND SERVICE IN THE WILDERNESS

The visitors to Landmannalaugar were asked whether they considered that unspoiled wilderness was a part of the attraction of the area; 90% of them agreed, about 3% disagreed and the rest did not have an opinion. The visitors were then asked what kind of infrastructure or disturbance of the natural surroundings they considered acceptable in a highland area without ruining the feeling of unspoiled wilderness. The results showed that 80% considered that mountain huts did not disturb the unspoiled wilderness (figure 1). Neither did footpaths formed by hikers, according to about 65% of the visitors. Visitors seem to realize that their travel over a natural landscape inevitably has some effect. Just over half of them considered that vehicle tracks were acceptable and about 50% accept designed footpaths. Visitors considered other infrastructure or disturbance of land or the natural surroundings undesirable, regardless of whether the question concerned tourist infrastructure, such as service centres and hotels, or structures unrelated to tourism, such as power stations.

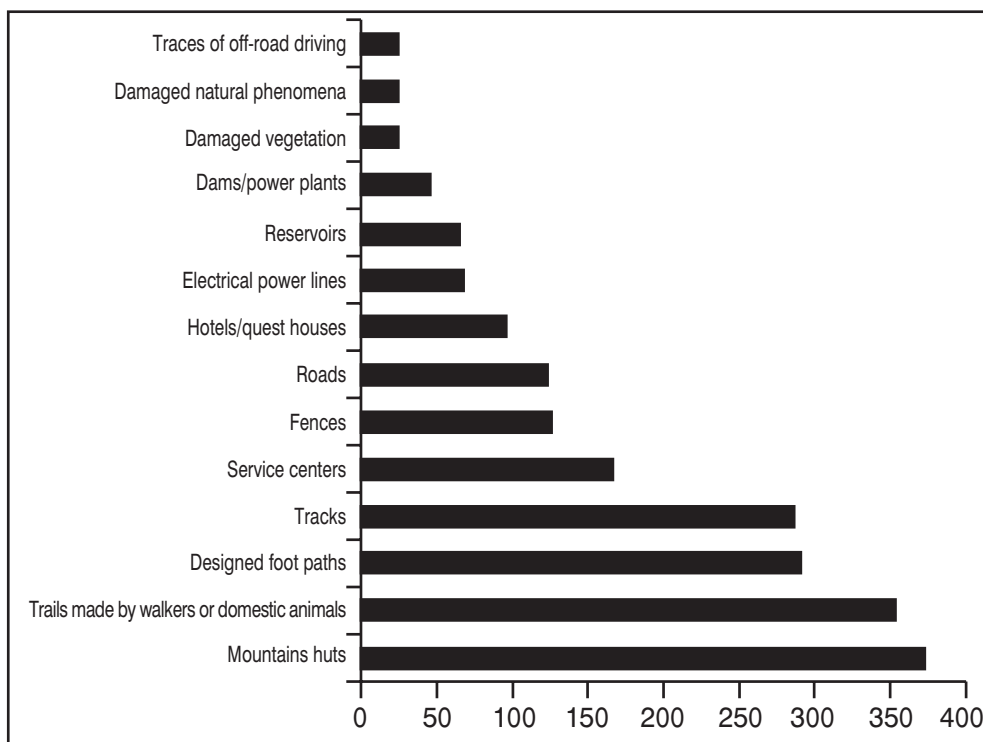


Figure 1. Which of the following may be present in an area for it still to be considered “unspoiled nature/wilderness”?

The interviews showed that the feeling visitors had for what was unspoiled wilderness was not strictly defined. One of the respondents said, for example:

...unspoiled wilderness is more or less a part of the attraction of the site... we were walking on a road but it was not even asphalted and some distance away electrical power lines could be seen.

He was then asked further whether the power lines did not disturb his feeling of wilderness and he replied:

No, it is important for the survival of the country to have electricity... This [the electrical power lines] might have disturbed me but they certainly did not ruin my feeling [of unspoiled wilderness].

The contradiction between people’s opinions and their demands for unspoiled wilderness

is obvious in the reply of a female visitor, for example. She had praised this unspoiled nature that she considered so important to be able to enjoy at Landmannalaugar, but then she said:

I think that one should not change anything here except... surely one of the Travel Association engineers could try to regulate the water in the natural warm spring somewhat better... It is here... cold/warm, cold/warm you know...

In other words, for her at least transforming nature is in order if it increases the comfort of the tourists.

Many of the interviews revealed different contradictions between what infrastructure people found was desirable in the Highlands and then what they really used or would use if it were there. One of the respondents said:

I think the service and the cabins are rather primitive and that is good.

He then described the doubts he had about having the shop in the area but later in the interview he told about the beer he had bought in that very same shop. The interviewer then pointed out the contradiction and he replied:

...as it is here I use it...I absolutely do not want a restaurant here but if it were here I would most certainly use it as well. Although I am used to all kinds of comforts and appreciate them I could do with less.

These results are undeniably contradictory. Unspoiled nature becomes disturbed as soon as traces of visitors become obvious, as undeniably happens when organized campsites are built or tracks are marked. It can therefore be concluded that these visitors need considerable infrastructure if they are to visit the area. These visitors seem to accept the change in the natural surroundings that results from their own visit. They chose comfort and safety rather than the “raw” reality and this certainly affected their opinion of “unspoiled nature”.

As cited above, several researchers have used the Purist scale to measure people’s perception of wilderness (e.g. Hendee et al., 1968; Stankey, 1973; Wallsten, 1988; Vistad, 1995). One question in this survey was based on a model similar to Stankey’s (1973). A total of 14 items were used and the persons interviewed were asked to indicate the importance of each item. Each response was weighed using a five point Likert scale (1= not important at all, 5 = very important) and the average for each item was calculated (figure 2). The results were used to evaluate which group each tourist belonged to. They showed that 3% of the visitors were strong purists, 26% purists, 47% neutralists and 24% urbanists. Figure 2 shows that although tourists at Landmannalaugar find it most important to experience unspoiled nature and the silence (the purist’s view) they also find it important to have organized camping places,

marked paths and walking bridges, which are typically urbanist needs.

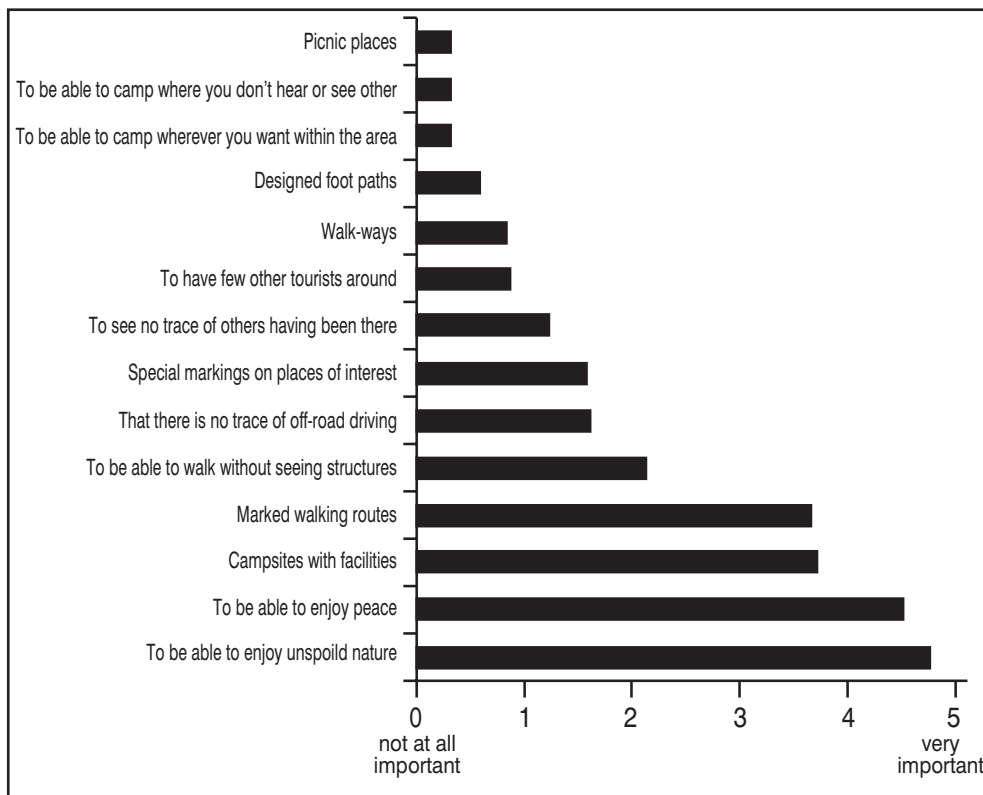


Figure 2. How important are these facilities/characteristics for you while travelling in this area?

SATISFACTION AND EXPECTATIONS

There are several factors that need to be taken into consideration when evaluating tourists' perceptions. One of these is how satisfied the visitors are. Amongst the tourists at Landmannalaugar there is a large general satisfaction with the environment as more than 85% of the visitors felt that the area lived up to their expectations with regard to the natural environment (figure 3). On the other hand only around one third of the visitors felt the facilities and services at Landmannalaugar completely lived up to their expectations and an additional 20% felt the facilities and services were excellent. This did not however, seem to affect the general satisfaction of the visitors in the area.

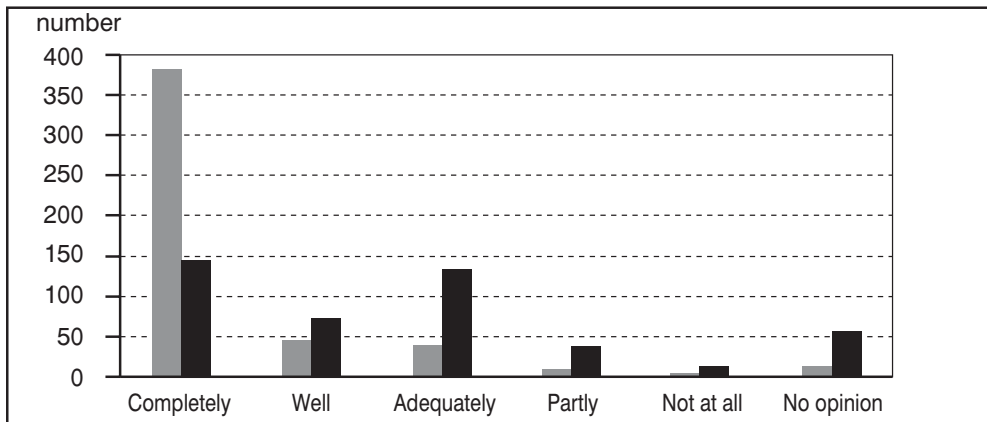


Figure 3. How well did Landmannalaugar live up to your expectations?

Most of the tourists (90%) were satisfied with their visit to Landmannalaugar. On the other hand, there was a small group of visitors, or 8%, which was very dissatisfied with their visit. The main complaint was the weather (40%), 20% complained about the facilities and 15% mentioned the prices of the facilities and service. Around 12% of the tourists mentioned that they were disappointed with the large number of tourists in the area.

Solitude is an important part of the wilderness experience and many of the interviews show that having few tourists around is an important part of experiencing the area. One French respondent said of one of the less crowded hikes:

This was very wonderful as no one else was there. We did not pass one single person on the way.

Having few tourists around was also important to one of the Icelandic respondents, who preferred to travel in mid-week instead of on weekends.

I most certainly do not want to walk in a row of people in the hiking areas... I try if possible to avoid places in the Highlands where it is crowded. It is so much nicer to be there when there are few people.

In the questionnaire people were asked about their opinion on the number of tourists in Landmannalaugar. About 68% thought it was adequate, but over 20% perceived crowding. The tolerance of the last group has possibly already been exceeded. One of the German respondents said:

The nature is clearly very sensitive here and probably cannot cope with the number of visitors who come here.

CONCLUSIONS: MAINTAINING A WILDERNESS EXPERIENCE

Planning tourism in a wilderness area is a complex issue as tourism inevitable changes the area. The landscape of Landmannalaugar is not the same as it was fifty years ago and without the service huts and the road it would be a totally different experience to come there. However, the infrastructure has a purpose, as over one hundred thousand tourists visit the area annually.

To provide recreation opportunities in a wilderness area like Landmannalaugar is a complex issue as pluralism exists in values and interests and there are conflicts of opinion about the development of tourist facilities. There has been considerable demand for more and better services at Landmannalaugar. As these demands have been acted upon the site has lost some of its wilderness character. These demands continue and there are many commercial interests willing to respond so it is not possible to foresee the final results. Some of the tourists who stay at Landmannalaugar are not really prepared for a wilderness experience and expect services like a shop where they can buy groceries. Permission has therefore been given to run a “shop” there. The study indicated that visitors have diverse opinions about whether the shop belongs in the area and whether it spoils the wilderness experience. A contradiction exists in the fact that although tourists seek to experience “unspoiled” wilderness, some of them at the same time want good basic services and infrastructure. Others use the services “because they are there” but not because they need them.

The physical carrying capacity at Landmannalaugar has been extended several times with new infrastructure; some of it has increased the environmental tolerance, but at the same time affected the tourist experience. An example is the wooden bridge from the main hut to the warm spring. Before it was built one had to walk through sensitive wetland with cotton grass. The trampling degraded the vegetation each year and finally passed the resilience and tolerance of the plants. The bridge raised the carrying capacity of the vegetation but instead the tourists cannot feel and sense the plants in the same way as before. The study showed that developments at Landmannalaugar have had the effect of doing away with the former appeal to the most puristic tourists so that strong purists are hardly found there anymore (only 3%). Part of the reason can be found in this quotation from an Icelandic tourist in another less popular highland destination:

One does not bother to go to Landmannalaugar any more, as it is far too crowded with foreign tourist.

At the same time many visitors are very satisfied with Landmannalaugar. The place is a symbol of wilderness in many people’s minds and they value it and use it to gain a wilderness experience. This indicates that, the social carrying capacity has been reached by some tourists, but not others.

The concept of carrying capacity helps to understand the ways in which management decisions affect recreation experiences. The concept is of limited use, however, unless clear objectives

have been made for the use of the area (Shelby and Heberlein, 1984). Conservation regulations have been in force at Landmannalaugar since 1979 but a detailed protection plan has not been made. In 1994 a comprehensive plan was drawn up for the southern part of the Highlands, which includes Landmannalaugar. This plan states that the aim is to keep the natural environment as unspoiled as possible; the plan also proposes that Landmannalaugar should be a major service centre for that area. This description is too general and for example provides no clear objectives about what kind of experiences tourists are supposed to gain in the area. It will therefore be difficult to use the carrying capacity concept to determine limits for tourism growth based on them.

It is important to look at Landmannalaugar in the framework of a planning system like ROS (Recreation Opportunity Spectrum), for example. ROS helps us to understand how important diversity is in recreational opportunities and how much infrastructure and development should be allowed at different places. Since there are not many areas in the Highlands as accessible from Reykjavik as Landmannalaugar, it is tempting to sacrifice a part of the wilderness quality of the area for urbanists who want to experience wilderness to some extent, given that other remote areas will be preserved for purists.

In 1998 - 2001 the facilities at Landmannalaugar were improved as a big shower and toilet house was built at considerable cost. The location, however, was not re-evaluated as would have been useful and logical to do before any major new development. If the discordant buildings had been moved only two kilometres northeast towards the main mountain road the heart of the area would have remained "unspoiled". Visitors with walking difficulties could easily have been driven with buses into the heart of the area in order for them to see the most beautiful spots. But buildings and the jeep traffic would not be there anymore and would no longer have disturbed the wilderness experience. Consequently the area would have appealed to a wider variety of tourists, that is, strong purists as well as urbanists on daytrips.

After the big investment in 2001 this is highly unlikely to happen and the area will almost certainly keep on developing where the buildings are now. As most of the trekking traffic is on the hiking trails within a one-hour walk from the service centre, those seeking the real wilderness experience do not need to go far in order not to see any sign of humans. Wardens and good hiking maps play an important role in informing those seeking that experience. Land use allocation issues have not been resolved in Iceland. The result is that highly sensitive areas have been transformed randomly into recreation areas. This happens, for example, when accessibility suddenly increases as roads are built for hydroelectric power plants. This kind of change of land use should not happen randomly. In order to keep that from happening it would be efficacious to guide development on a perspective based on ROS and the concept of tourism carrying capacity.

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The Impact of Cultural Festivals on Tourism

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ABSTRACT

This paper aims to investigate the impact of festivals concerning cultural tourism regarding the host community. The literature research in this paper focuses on an area of study related to cultural tourism and the role of festivals in the creation of opportunities for community orientated events and festivals.

The findings of this research show us that festivals have contributed in the development of cultural tourism. Festivals attract culture tourists to local community events to promote enriching exchanges between tourists and resident. It was found in the case studies of Edinburgh Festival and Leeds West Indian Carnival that festivals have become a major tourist attraction for the local, regional and international visitors.

Key Words: Impact, festivals, culture, tourism, local communities

INTRODUCTION

Today festivals are considered to contribute significantly to the cultural and economic development wealth of the United Kingdom. Festivals have major impacts on the development of cultural tourism to the host communities. The festival organisers are now using the historical and cultural themes to develop the annual events to attract visitors and create cultural image in the host cities by holding festivals in the community settings. The desire for festivals and events is not specifically designed to address the needs for any one particular group. The hosting of events is often developed because of the tourism and economic opportunities additional to social and cultural benefits. Many researchers have contested that local communities play vital roles in developing tourism through festivals.

Events have the potential to generate a vast amount of tourism when they cater to visitors from other generating zones plus the potential for grants, or sponsorships, (Getz, 1997) either by direct or indirect intent. The government now support and promote events as part of their strategies for economic development, nation building and cultural tourism. The events in turn are seen as an important tool for attracting visitors and building the image within different communities. According to Stiernstrand (1996), the economic impact of tourism arises principally from the consumption of tourism products in a geographical area. According to McDonnell, Allen and O' Toole (1999), tourism related services, which include travel, accommodation, restaurants, shopping are the major beneficiaries of the event.

As far as events and tourism is concerned, the roles and responsibilities of governments as well private sector and society in general have significantly changed over the last decade. The situations have been changed where the state had the key responsibility for tourism development and promotion to a world where the public sector is obliged to reinvent itself by relinquishing its traditional responsibilities and activities in favour of provincial, state and local authorities. This indicates the growing influence on the behaviour of governments and business in general of development of event and tourism industries. This suggests that festivals impact on the host population and stakeholders in a number of ways. These factors are primarily concerned with a plethora of impacts, social, cultural, physical, environmental, political and economic all of which can be both positive and negative.

This paper initially reviews literature related to cultural tourism and the role of festivals in the creation of opportunities for community orientated events and festivals which contrast with tourist orientated events which have tenuous links with local communities. Moreover, the paper will argue that community based events and festivals provide an opportunity for the celebration of local identity and community empowerment and create tourism for the local area.

The case studies within this paper explore the development of cultural tourism and multi-cultural festivals and events with the UK, and the positive contribution that these events play in solidifying community relations with development of the cultural tourism.

CULTURAL TOURISM

Cultural tourism is defined by international Cultural Tourism Charter professionals as

" Domestic and international tourism continues to be among the foremost vehicles for cultural exchange, providing a personal experience, not only of that which has survived from the past, but of the contemporary life and society of others.."

<http://www.icomos.org/tourism/charter.html>

The culture is an identity and the importance that individual people place on local and national social organisations, such as local governments, education institutions, religious communities, work and leisure. Cultural tourism describes tourist who take part in the cultural activities while away from their home cities. Cultural tourism is that form of tourism whose purpose is to discover heritage sites and cultural monuments on their travels. Keillor (1995) in an address to the White House Conference on Travel & Tourism, best described cultural tourism by saying,

"We need to think about cultural tourism because really there is no other kind of tourism. It's what tourism is...People don't come to America for our airports, people don't come to America for our hotels, or the recreation facilities....They come for our culture: high culture, low culture, middle culture, right, left, real or imagined -- they come here to see America."

http://www.nasaa-arts.org/artworks/ct_contents.shtml

The theme of culture has grown over the last two decades but no clear definition of culture has been accepted by the community as whole. Culture in modern day terms is seen as a product by governments, large organisations and individual people to develop their own standing in the given market. Wyman states that culture plays important part in the society:

"...In an economic climate where we hear so much about crisis in health and education, it is important to remember that culture, too, is an essential element of a healthy society. It's not an either-or situation. Health is necessary for life; culture makes life worth living...."

<http://www.culturematters.ca/index.html>

Moreover, cultural tourism relates to those individual groups of people who travel around the world, individual countries, local communities and individual events that seek to experience heritage, religious and art sites to develop knowledge of different communities way of life. This can include a very wide range of cultural tourist experiences. It can include, for example, performing arts, festivals, visits to historic sites and monuments, educational tours, museums, natural heritage sites and religious festivals.

DEVELOPMENT OF CULTURAL TOURISM THROUGH FESTIVALS

Festivals have changed over the years, before festivals were associated with key calendar moments, linked specifically to particular seasons and heritage sites. Over the last decade these have been changed and developed upon, there is now a broad and diverse range of festivals events taking place all over the world.

Getz (1997, p.1) introduces festivals events as a:

"Events constitute one of the most exciting and fastest growing forms of leisure, business, and tourism-related phenomena."

Goldblatt (2002, p.1) introduces festivals events as a:

"Kaleidoscope of planned culture, sport, political, and business occasions: from mega-events like Olympics and World fairs to community festivals; from programs of events at parks and attractions to visits by dignitaries and intergovernmental assembles; from small meetings and parties to huge conventions and competitions."

The revolution in festivals has been stimulated through commercial aspect to meet the changing demand of local community groups and increasing business opportunities for the event organisers and local businesses. Festivals play a major part in a city and local community.

Festivals are attractive to host communities, because it helps to develop local pride and identity for the local people. In addition, festivals have an important role in the national and host community in context of destination planning, enhancing and linking tourism and commerce. Some aspects of this role include: events as image makers, economic impact generators, tourist attractions, overcoming seasonality, contributing to the development of local communities and businesses, and supporting key industrial sectors.

Festival organisers are now using historical and cultural themes to develop annual events to attract visitors and creating cultural image in the host cities by holding festivals within community settings. Festivals provide an opportunity for the local people to develop and share their culture, which create a sense of values and beliefs held by the individuals in a local community. Festivals provide the tourist the opportunity to see how the local communities celebrate their culture and help the visitors to interact with the host community and help people to enjoy and meet their leisure needs.

The peoples and communities that host the festival provide the visitors with a vibrant and valuable culture. In addition, culture is the personal expression of community heritage, community perspective, it provides cultural opportunities for the visitors to enjoy and experience local illumination and culture. The festivals also provide support to those who pursue economic opportunity related to sharing community culture with the broader world. UNEP (2002) suggest that cultural tourism is boosted through the development of festivals and events. Tourism can add to the vitality of communities in many ways. One example is that events and festivals of which local residents have been the primary participants and spectators are often rejuvenated and developed in response to tourist interest.

IMPACT OF FESTIVALS ON HOST COMMUNITY

Event organisers do not take into account the social and environmental impact into consideration. It is argued that there is a clear need to adopt a holistic approach:

“In any location, harmony must be sought between the needs of the visitor, the place and the host community.”

(English Heritage, 2000 p.29).

Host communities play a major role when running a major sporting event or any other large scale event. Also, sporting events play a major role in host communities. The work of Getz (1997) was concerned with the event manager gaining support and resources from the host area community, while also looking at the local benefits and costs, cultural meanings of their event and also the political factors. If all this is taken into consideration then it can lead to a good event and even a good relationship between events and the local community.

A problem a host community may have with the event is the influx of people and it being unable to cope. This may have a knock on effect in terms of traffic congestion, crime and vandalism. Also Smith (1989) tells of how the socio-cultural impacts result from the interaction between ‘hosts’ and ‘guests’. A number of factors may contribute to difficulties in this relationship. The transitory nature of a visit to a historic centre may be too short to allow any understanding to be established. Repeat visits may be more positive in this context. Visitors, especially those on day visits, have temporal constraints and become more intolerant of ‘wasting time’, for example in finding somewhere to park. Spontaneity may break down as ‘hospitality’ becomes a repetitive transaction for the host (Glasson et al 1995, pp.34-5).

The impacts of events can greatly affect the quality of life of the local residents. Therefore, it has been argued that strategies need to be adopted to take into account the social and environmental impacts of festivals into analysis when carrying out economic impact of the each individual event. The event organisers only takes into consideration the economic implications and ignores the residents perceptions, which provide important non-economic dimension for gauging how events benefit or impinge on the host community (Jeong and Faulkner, 1996; Hall, 1992).

Festivals have both positive and negative impacts on their host cities, but emphasis is often focused on the economic analysis. Hall (1992) suggests that the ability of major events perceived to attract economic benefits often provide the official justification for why the event is to be hosted.

“Economic analysis of events provides one aspect of why events are held and the effects that they have on a region. However, while many of the economics impacts of events are quite tangible many of the social are not.”

(Hall, 1992 p.10)

The community festivals now play a significant role in income generation for the local businesses and create tourism for the local area. The festivals are becoming more and more tourist attractions over the last 10 years, which have great economic impact on the host communities. This tradition has changed over the last decade, due to the fame and the size of the event. The event industry has developed over the years, due to the expansion of information technology and media network. The festival organisers now utilise these new communication tools to advertise their event to wider audience. According to McDonnell, Allen and O’ Toole (1999),

“The process is speeded up by the technology and the media, which have the power to bring significant local events to a worldwide audience, overcoming the barriers of national and cultural differences.”

(1999 p. 54).

Festivals now attract visitors from all over the country and including people from other countries. The festival organisers now able to target wider audience through use of technology and media, this has considerable economic impact on the host community, which creates tourist to visit the area and stay longer in the area. Goldblatt believes that

“Some communities use these events to boost tourism during the low or off-season and others focus primarily on weekends to appeal to leisure travellers.”

(1997 p.7).

Economic values are often placed on the benefit of publicity obtained for the event, which may occur before, during and after its occurrence. Column inches and advertising costs are used to quantify such impacts.

Boud-Bovy & Lawson, (1998); Key Leisure Markets, (2001) suggested the expenditure in the local economy is more likely to *support* supplier jobs in tourism-related sectors of the economy rather than *create* new jobs, however, many other factors will also have an impact. UK Sport (1997) believe that a critical mass of events taking place in a local economy over a sustained period, is more reasonable to suggest that a job creation effect was linked to economic growth through events.

Economic impacts may be presented using results of benefit/cost analysis, input/output analysis, and simply economic benefits to local society. Getz's model (See figure 1.0 below).

Getz demonstrates the potential benefits of events below:

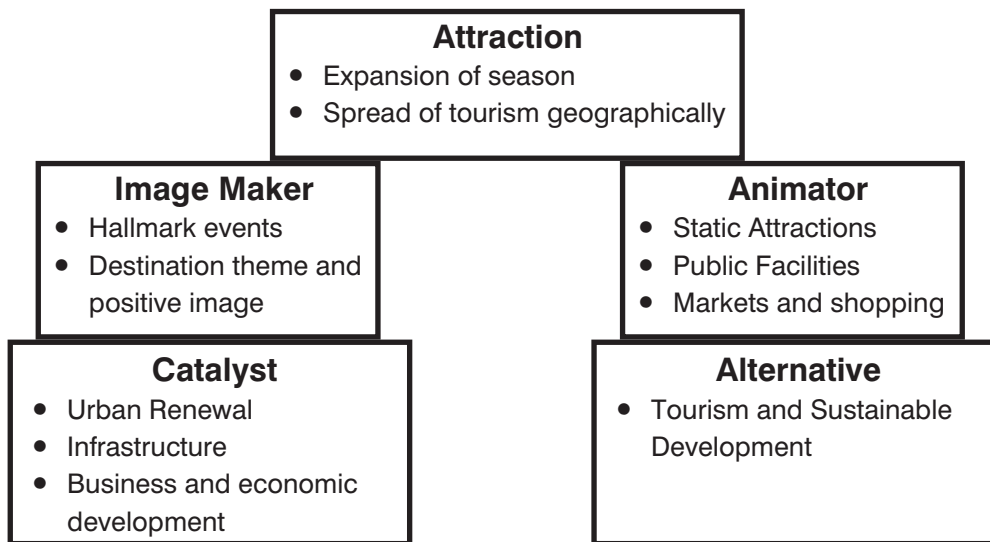


Fig 1.0 Tourism-related roles of festivals and special events, Getz, 1991 p.6.

According to Getz (1997) economic impact assessments often include a multiplier calculation to demonstrate that incremental tourist expenditure has direct, indirect and induced benefits for the local economy. At the most basic level, economic impact analysis techniques estimate average spend per person, multiplied by the total number of visitors/users to determine the direct spending associated and then applied multipliers to estimate secondary or indirect economic effects. The multiplier usually used in tourism impact studies is the “income multiplier” which is basically a coefficient which expresses the amount of income generated in an area by an additional unit of tourist spending.

Case studies have been chosen of two outdoor festivals, which take place on an annual basis. The case studies are used to offer discussion points on the hosting of outdoor events and economic impact it brings to the host city. Case studies will compare the economic and cultural tourism impact assessment of Edinburgh Festival and Leeds Caribbean carnival.

EDINBURGH FESTIVAL

The Edinburgh Festival has become major calendar event for the city of Edinburgh, the festival has developed cultural tourism and created cultural image for all groups within the community. The city has also long been world-renowned for its rich history, culture and heritage and for hosting leading international events giving it an excellent tourism infrastructure.

The Edinburgh Festival developed since the late 1940s and it has become a major hotspot for the artistic and tourists to enjoy multi-cultural events during the month of August each year. The festival has developed the following programmes over the years to attract visitors from all over the world to demonstrate multi-cultural image. Each summer it is host to the world's largest arts festival, the Edinburgh International Festival and Fringe Festival which are merely the biggest and best known events from an annual list which includes the Edinburgh Military Tattoo, Hogmanay celebrations, International science festival, International book festival, Jazz festival and Film festival.

The Edinburgh Festival provides a phenomenal six weeks of arts and culture in the city. Festival Director Brian McMaster said:

“We are delighted at the response to this year’s programmes. Reviews have been excellent, but, more importantly, our audiences are clearly having a very good time, and are trying out a wide range of familiar and less familiar events.”

<http://www.edinburgh-festivals.com/festivals.cfm?id=International>

The Edinburgh International Festival has developed significantly over the years, yet the founders' original intentions are closely reflected in the current aims and objectives. This highlights the point that even though Edinburgh is a successful festival destination at present to remain competitive in the global marketplace it must continually invest in itself to retain and improve on its position. It has been estimated that tourism is worth over £1.1 billion per year to Edinburgh and supports over 27,000 jobs according to the Edinburgh Convention Bureau (ECB) and of this business tourism and conferencing accounts for around £120 million annually with its value increasing year on year.

The Edinburgh Festival attracts tourist from all over the world, over the last decade cultural tourism has increased in large numbers. According to official Edinburgh International Festival Audience Research (2002):

“43% of the Festival’s audience comes from Edinburgh and the Lothians, 18% from the rest of Scotland, 21% from the rest of the UK and 17% from overseas. Visitors stay an average of 8 nights in Edinburgh.”

The success of Edinburgh as a festival destination can be attributed to a combination of factors. The visitors come to Edinburgh either specifically for the International Festival or its unique heritage and cultural history, Edinburgh is also renown for it conferencing destination.

A report carried out by the Business Tourism Forum and Business Tourism Advisory Committee highlights Edinburgh as a strong business tourism destination but detected certain infrastructure weaknesses including:

- Insufficient number of direct flights and the lack of a direct transport link into the city centre.
- Inadequate exhibition space attached to the Edinburgh International Conference Centre.
- Need for an additional 400-500 bedroom hotel to act as a headquarters hotel.

Moreover, this increasing value of business tourism to the city can be attributed to Edinburgh becoming the UK's leading conferencing destination according to the International Convention and Congress Association (ICCA). In 1995 Edinburgh was outside ICCA's destination league table's top 20, yet jumped to 13th position in 1998 and in 2001 was placed 12th. This steady rise followed the opening of the EICC on 17 September 1995.

LEEDS WEST INDIAN CARNIVAL

The Caribbean carnival is an annual event celebrated in the city since the early 1960s. The carnival is one of the oldest Caribbean carnivals in Europe. In its earlier days the Leeds West Indian Carnival used to go into the city centre, that tradition changed during the eighty's. The carnival has out grown its original setting since the early eighty's and now it take place around the local communities of Chapletown and Harehills. The carnival has created multi-cultural spirit for people of all races and nationalities attending the event during the August bank holiday each year since 1967. Carnival founder Arthur France said:

"This continues to be one of this city's most important and enjoyable family attractions."

"Our events in the run up to Carnival Day provide something for everyone as well as giving the whole city the chance to come together in one big party."

(Yorkshire Evening Post, 2002).

Behind the colour and music of the carnival there is a deeper meaning rooted in the experiences of Caribbean people arriving in England around a time of great change in the late 1950s and early 1960s. So it was a search for identity, for community and belonging that led to the carnival being developed in the early 1960s in the area of Notting Hill in London. As stated by the William Stewart the founder of the initial Caribbean carnival in this country.

"This great festival began initially from the energies of black immigrants from the Caribbean, in particular, Trinidad, where the Carnival tradition is very strong, and from people living locally, who dreamed of creating a festival to bring together the people of Notting Hill, most of whom were facing racism, lack of working opportunities and poor housing conditions resulting in a general suppression of good self-esteem."

Source: <http://www.mynottinghill.co.uk/nottinghilltv/carnival-countdown.htm>

The carnival has created that platform for the Caribbean people to come together and share their social and cultural differences with the local community from numerous backgrounds. It is about people coming together and people having fun.

The attendance at the event varies from 10,000 to 100,000. The attendance at the actual carnival site is 80,000, as procession leaves the Potternewton Park the numbers of carnival watchers grows in large numbers. Over the last ten years the tourist to the area has grown in large numbers, because the event itself has attracted tourism to the area by its glorious and characteristic of the event. However, the other element is the image of the carnival expressing an invisible side of local and international culture being developed by the event over the years to attract more and more visitors to the area.

The carnival has created a very special image for the city of Leeds, because it has brought local community together and enhance the local image which has attract tourism from all over the country and people come to the carnival as far as Caribbean Islands. Carnival founder Arthur France said:

“This continues to be one of this city’s most important and enjoyable family attractions. Our events in the run up to Carnival Day provide something for everyone as well as giving the whole city the chance to come together in one big party.”

(Yorkshire Evening Post, 2002).

The carnival organisers suggested that the event is becoming more and more a tourist attraction, in the last decade have developed as a natural outgrowth and benefited the local economy. This is due to the better press coverage by the local and national press, previously carnival relied on local visitors over the years, but in last five years with the growth and size of the carnival increasing, it is now seen as one the major tourism attractions in the area. In return it has had considerable economic and social impact on the local community of Leeds. It is now strongly viewed by the local community and small businesses that carnival is a significant part of attracting tourism to the area and they value the tourist market as a vital tool for the development of the local economy. Therefore, carnival has been seen as a key development event which has generated tourist attraction to bring the local, national and international tourists to this unique event.

Leeds West Indian Carnival in the last decade have developed as a natural outgrowth and benefited the local economy. However, the economic development of this festival has impacted upon the local small and large businesses, during the period leading up to the event. The festivals have become centre piece events for the local economy each year. The local hotels, restaurants, taxis, public transports and small stall traders have planned their business activities around these events. Moreover, cultural tourism to the local area has increased over the last decade, visitors are attracted to these festivals as far as Asia and Caribbean Islands. The event-tourism has been increased, which has developed greater economic and cultural benefits to the local areas.

CONCLUSION

The findings of this research show us that the festivals have contributed in the development of cultural tourism. Festivals attract culture tourists to local community events to promote cultural exchanges between tourists and resident. Cultural tourism brings benefits to the host cities, these benefits are not being analysed in greater depth.

The research suggests, there is no doubt that tourism festivals have major affects on the local economy directly and indirectly. That the spending by visitors on local goods and services has a direct economic impact on local businesses and also these benefits pass more widely across the economy and the community. On the other hand, cultural tourism does not take into account the loss of local beauty, environmental degradation and effects it creates on the local people of the host communities through their direct and indirect involvement with tourists.

The study also found that some leading authors, Goldblatt 2002, Getz 1997 and Hall, 1992 argue that the festival organiser and local government only take into account the economic impacts and ignore the implications of social impacts of festivals. They argue that greater attention should be paid to the social impacts of festival.

This research has also suggested that cultural tourism has been increased through development of local festivals and provided greater economic and cultural benefits to the local area. The visitors are attracted to these festivals from as far away as Europe and Caribbean Islands. It was found that social and economic factors contributed to culture tourism growth in these festivals. The Edinburgh Festival and Leeds West Indian Carnival festivals have become a major tourist attraction for the local, regional and international visitors.

This study highlighted in particular the Edinburgh Festival and Leeds West Indian Carnival festivals having economic impacts on the local economy and the community. Nevertheless, only an in-depth study can help us to understand the level of economic and social impacts these two festivals bring to local businesses and community in a wider scenario.

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The Role of Tour Operators in Sustainable Ecotourism: Lessons from Kenya

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ABSTRACT

In recent years sustainable tourism has been promoted in policy documents, strategic plans and the academic literature related to tourism. There have been numerous attempts to define the term, yet few have explored the role and status of tour operators who directly influence the types of tourists brought to an area as well as the visitors' expectations and activities. In this study, the focus is on two popular travel destinations in Kenya that is Amboseli National Park and Masai Mara National Reserve with particular attention to the roles of the tour operators within the ecotourism sector. The study was done due to the limited research in this area especially from the tour operator perspective in Kenya. The study adopted a questionnaire survey with ten tour operators from each study area. The results show that tour operators have a pivotal role in shaping the development of tourism destinations and the nature of ecotourism demand. There should also be an enhanced relationship between the tour operators and the local communities.

Keywords: tour operators, local communities, ecotourism, sustainable development, participation, impacts

INTRODUCTION

Ecotourism has generated great interest from governments, tourism enterprises, tourists, conservation groups and other stakeholders in the industry because ecotourism emphasises small-scale, locally-owned infrastructure in contrast to the expensive infrastructure associated with mass tourism (Cater, 1994; Sindiga, 1999). Ecotourists are expected to have a harmonious relationship not just with nature but also the local communities which host them. As such they are expected to respect the host communities, their cultures and customs. Ultimately, a kind of partnership should be developed with the result that cultural insensitivity and various forms of cultural abuse are minimised if not completely eliminated (Sindiga, 1999). One of the favourite arguments put forward in support of ecotourism is that it attracts fewer tourists. Yet, the numbers of tourists need not be a problem in all areas. Tour operators are intent on attracting more international visitors.

This may explain Western's (1993) plea that the definition to ecotourism should shift from the narrow focus on small-scale developments to principles applicable to nature-related tourism. The Kenya government gives priority to environmental conservation and management in tourism development. It is committed to finding solutions to beach pollution and the

deterioration of certain national parks through supporting the efforts of the Kenya Wildlife Service in wildlife conservation and management (Kenya, 1994). Kenya's pragmatic approach appears to be rooted in the idea explored above of viewing ecotourism as a set of principles emphasising responsible travel. The Kenya government sees ecotourism as having the potential of becoming a moderately useful tool for locally directed and participatory rural development based on a rational utilisation of environmental and cultural resources on which tourism is based. According to Stein et al. (2003), it is difficult to underestimate the role of education in ecotourism.

Some authors insist that education must occur if nature-based tourism businesses can be described as ecotourism (Fennell, 1999; Honey, 1999; Wallace and Pierce, 1996). Although education might or might not be directly stated as a component of ecotourism, education has an important role in helping to provide a sustainable supply of quality nature-based recreation experience as well as ecotourism opportunities.

MAGNITUDE OF ECOTOURISM ACTIVITY

Olindo's (1991) statement that Kenya received 650,000 ecotourists in 1989 is certainly an exaggeration, as this figure represents the entire international stayover intake for that year. However, it appears, on the basis of high park-visitation levels that a large proportion of tourists participate in safari or other nature-orientated experiences while visiting the country, a contention supported by the following surveys: Firstly, a random sample of 1,678 tourists conducted in 1990 revealed that 70% are motivated to visit Kenya primarily because of the unique opportunities for viewing wildlife in a natural setting, presumably involving, for the most part, certain protected areas (Akama, 1996). Another survey, undertaken in 1993 with participation from 3,107 departing tourists, resulted in a comparable 70.6% of the sample citing 'nature and wildlife' as among the principal attractions experienced during their stay in Kenya. The second most popular attraction was the 'beach' cited by only 32.6% of the respondents (JICA, 1994; Weaver, 1999). In 1993, the Coast accounted for 3,940,000 bed-nights (or 64%), compared with 1,149,000 (19%) for Nairobi and just 584,000 for up-country lodges, a form of accommodation associated with safari-style tourism. Nevertheless, and apparently to an even greater extent, natural attractions are central to the Kenyan tourism product. The patterns of motivation and accommodation suggest the relatively minor status of the active ecotourism market.

However, because of the difficulty in drawing a boundary between the passive ecotourist and the non-ecotourist, it is probably more useful to refer to the magnitude of passive ecotourism (Weaver, 1999).

SUSTAINABLE ECOTOURISM DEVELOPMENT

Sustainability as a concept involves a number of different strands. Environmental, ecological and economic factors assume that it is applicable in the technical sciences, whereas social and political factors relate to power and values. Within these strands, questions of scale,

family, community, region, timescale, project life, indefinite and so on are critical elements. These ideas are illustrated most clearly using examples that gradually bring them closer to tourism applications (France, 1997). Sustainability has emerged as a popular term and has been widely viewed as holding considerable promise as a vehicle for addressing the problems of negative tourism impacts and maintaining its long-term viability (Liu, 2003; Page and Thorn, 2002). In line with the paradigm of sustainable tourism it is believed that negative effects can be avoided or minimised if tourism development is thoroughly planned and controlled (Gössling, 2000).

The emergence of the concept of sustainable development according to (Hardy et al., 2002), marked a convergence between economic development and environmentalism. The philosophy of this concept was, small is beautiful, typifying the eco-development approach and this was subsequently incorporated into the strategic plans of many industries, including tourism. Thus, Sharpley (2000) attests that the theory of sustainable development can be usefully explored by combining development theory with the concept of sustainability. Inevitably this over-simplifies the complex amalgam of political, economic, cultural and ecological processes encompassed by sustainable development.

In October 2002, the Ecotourism Society of Kenya (ESOK) became the first to launch an Eco-rating scheme in Africa. The ESOK Eco-rating Scheme is a voluntary initiative by the Kenyan tourism industry, designed to further the goals of sustainable tourism by recognising efforts aimed at promoting environmental, economic and social-cultural values. Eco-rating can be defined as a systematic approach for verifying a tourism organisations performance when evaluated against an agreed set of criteria (environmental, economic, social and cultural). Its principle goal is to encourage tourism businesses to conserve the natural resource base upon which our tourism is dependent. The scheme's focus is on tour operators, hoteliers, lodge and camp operators as well as destination managers. It aims at providing these businesses with an opportunity to review and improve their operations towards 'best practice', leading to overall improvement in environmental performance.

Under this scheme, best includes, among other things: protecting, conserving and investing in the environment; minimising and reducing wastes; preventing pollution; support of local communities and economies; responsible use of resources such as land, water and energy; and education to tourists. The envisaged benefits of the scheme in the short and medium term have the potential to attract more tourists while at the same time enabling significant resource management related savings to tourism businesses. In the longer term, sound environmental management and social accountability is central for ensuring the level of use that a tourism site can sustain without losing resilience (ESOK, 2002).

ROLE OF TOUR OPERATORS IN ECOTOURISM

Tour operators occupy a critical role in the tourism industry, given their role as intermediaries that design, organise, package, market and operate vacation and other tours. Hartanto (2001) concedes to the fact that tour operators are frequently passive observers of the process of

the establishment of tourism development policies. Hence, tour operators need to be critically aware of the obligations that will be enforced on them whenever a policy is implemented. Higgins (2001), Holloway (1981) and Thomlinson and Getz (1996) discovered that tour operators are key players in ecotourism as they directly influence the types of tourists brought to an area as well as the visitors' expectations and activities. Tour operators also typically interact with residents, for supplies, services, labour or approvals, and so can have economic and cultural roles to play, as well as environmental ones.

In many cases tour operators can influence local policy and encourage resident support for ecotourism, and can be catalysts for conservation. If well organised, tour operators might also seek to influence senior levels of government. On the negative side, ecotour companies can potentially cause or contribute to the destruction of natural and cultural resources in the destination through individual neglect or collective overuse. The actions of some operators can harm the reputation of others or negatively alter the destination's 'green' image leading to a community, governmental or tourist backlash. Some attention has been given in the literature to ecotour operators. Higgins (2001) argues that even though the experience offered by ecotour operators is clearly a crucial aspect of ecotourism, the production of ecotours has received much less attention within the literature than other topics such as protected areas, environmental impacts, biodiversity or economic valuation especially in Kenya.

METHODOLOGY

The study was conducted in Kenya which straddles the equator and covers an area of some 583,000 sq km. It is bordered to the north by the arid bushlands and deserts of Ethiopia and Sudan, to the east by Somalia and the Indian Ocean, to the west by Uganda and Lake Victoria, and to the south by Tanzania. The study attempted to identify the role of tour operators in ecotourism initiatives at Amboseli and Masai Mara (see map). The variables considered in this study are ethics, responsibility, information and actions as suggested by McLaren (1996) in evaluating ecotour operators. The data was collected using a questionnaire survey with ten operators in each area giving a total of twenty tour operators from different tour companies. The differences was necessary to avoid repetition of information and hence to get an individual tour operator perspective. The tour operators were selected purposively using a list obtained from accommodation outlets in the Amboseli and Mara. To explore answers to the research questions, frequency tables were derived using SPSS for windows and the open ended questions reported verbatim.

RESULTS AND DISCUSSIONS

The results show that there were no significant differences discernable between tour operators in Mara and Amboseli in terms of administration, marketing and operations. In terms of marketing, the tour operators promoted their business through the use of brochures, posters, websites, word-of-mouth, magazines as well as newspapers. The tour operators run their tours from June through to September and February through to May. These are the peak

periods of business for the tour operators in Kenya. It is important to note that 60% of operators in Mara have been in business for more than 15 years compared to only 30% in Amboseli. This, however, does not mean that the length of operations is the sole contributor to the negative impacts of ecotourism since the tour operators' clients have other interests as well.

In Mara, 70% of the operators frequently read environmental, nature or wildlife magazines and in while in Amboseli, 80% frequently read environmental literature. In the same vein, all operators in Mara belonged to conservation, environmental or recreation organisations compared to 70% in Amboseli. Tourism promotion brochures, safari briefs and lectures through travel agents, hoteliers and conservation organisations could play an important role in the education of visitors before they enter the Reserve and Park. In this study, tour operators (30% in both Mara and Amboseli) did not offer any opportunity to study nature in their brochures. However, 80% of operators in Mara and 90% in Amboseli have taken efforts to minimise impacts at the two destinations through learning opportunities and sensitivity to the environment and local people. Capacity was determined by the owner's perception of the desired level of comfort of the guests, with seven per van being the optimum. This small number of guests also allowed the operator to maintain greater control over activities and impacts on the environment. Operators in this study (90% in both Mara and Amboseli) have stated code of ethics and conduct that responds to a call by Henry et al. (1992) who suggested that a code of ethics and conduct must be developed for use by tourist companies and drivers.

Tour companies and their employees must recognise that it is in their interest, as well as the interest of the Reserve/ Park and wildlife, to establish a code of ethics and conduct which is consistent with the conservation of the resources upon which their business depends. More visitor awareness would therefore diversify interest and reduce the current selective activities, which are exerting pressure on a few animal species. Also, tour operators have a pivotal role in shaping the development of tourism destinations and the nature of ecotourism demand. This, according to Bramwell et al. (1998), explains why so much attention has been focused on tour operators' debates concerning sustainable tourism. They are in essence custodians of the impacts that might be seen in destinations.

COMMUNITY PARTICIPATION

Tour operators in the Mara and Amboseli encourage the visitors to learn about environmental, social and economic realities faced by the locals through engaging in conservation projects, poverty eradication, visiting Masai manyattas, learning of negative social effects and culture of the locals as well as economic empowerment of the people. This is done through opportunities where both the visitors and locals meet for cultural talks and dances, and participation in community activities. We must therefore address the fundamental question of how to restore the trust and get the support of local communities. We have to find mechanisms that involve the communities in open dialogue, and in the development, planning and execution of projects. Community involvement is an important aspect of this study

because, it can provide a means of controlling the impacts that ecotourism can have on local communities. Thus, community-managed ecotourism projects allow communities to decide what type of growth the community needs and, hence, help to manage impacts.

The relationship between the tour operators and the local communities hence plays a pivotal role in ensuring that such projects are in the long run viable and operational by all members of the communities. In this manner the resources in natural places could be preserved for a long time and there will be no need for endless conflicts on land issues. The majority of the tour operators had a very good and excellent relationship with the locals (70% of operators to Mara and 60% to Amboseli). This is due to the fact that locals depend largely on sales of curios and donations from the visitors including books for education and typewriters, employment provided by the tour operators, development of projects such as building of schools, ownership of campsites and their management, having Masai lectures and dances at a fee. Clearly, the training and employment of local guides help to ensure that the host community feels more economic benefits.

SUPPORT OF COMMUNITY DEVELOPMENT

Tour operators to Mara supported community development through developmental projects such as building of schools, clinic, bursaries, providing employment and enhancing economic development, government coordinated functions, eco-friendly properties managed by the locals and enhancing cultural tours. On the other hand, tour operators to Amboseli paid locals to perform cultural dances and entertain visitors, the visitors are also encouraged to pay tips, establish organisation that will look into the welfare of the community, support communities through visit to their manyattas, purchase of artefacts, souvenirs, donating books to locals and contribution to ongoing projects in the community. Some visitors also contribute money and material things which are given to the elders to distribute equally among the locals for developmental projects, whereby repeat visitors inspect the use of the money and materials donated when they next visit. We can therefore deduce that economically, ecotourism can affect the sustainability of natural resource use at ecotourism sites in several ways.

One, ecotourism may generate higher economic returns than other resource activities and two, ecotourism may benefit local economies, providing an incentive to ensure nearby biodiversity is used sustainably. Also, direct financial inputs are critical to the success of local ecotourism efforts along with other indirect inputs such as entry fees and local expenditures on food, accommodation, transport, and souvenirs. However, local expenditures can be seasonal, inflationary, transitory, or sensitive to political or economic situations. Therefore, if managed carefully, ecotourism can contribute towards conservation efforts in both Mara and Amboseli and if successful, the management could be applied to other attractions in the country and can act as a positive indicator for other natural areas in the world at large.

ECOTOURISM IMPACTS

When asked their overall response to the number of visitors to the Parks, 70% of the tour operators to Mara and Amboseli said they were many. The large number of visitors to a pristine area could obviously affect and damage the environment in a negative way if proper rules of use are not laid out, both to the visitors as well as tour operators. The self-rating scale was used with the tour operators and very high percentages were recorded in the good/detailed rating concerning the various concepts in comparison to the responses of the visitors. The concept of ecotourism (80% in Mara and 90% in Amboseli), conservation (90% in Mara and 80% in Amboseli), biodiversity and sustainability (60% in the case of Mara) had the highest response by the tour operators. This provides a good base for environmental education with the visitors to Amboseli and Mara.

Knowledge of these concepts suggest that the operators should seek to use interpretation to minimise visitor impacts in protected areas, communicate its roles and actions as a protected area management agency, communicate its laws and regulations with respect to resource protection, convey the significance or heritage value of particular protected areas, raise awareness and understanding of general conservation issues and encourage conservation action by individuals. Currently, visitors spend more time driving than viewing, in addition to the longer viewing times spent on the few rare species. Establishing one or more education-interpretation centres would alter this temporal use pattern by introducing some time lag, which would ultimately reduce crowding at certain attractions. Hvenegaard (1994) suggests that tour operators be evaluated on the basis of two components: their degree of control over various impacts and their level of commitment to the education of tourists.

From the study, soil erosion at walk trails (50% in Mara and 60% in Amboseli), wildlife attracted to rubbish bins (50% in Mara and 30% in Amboseli) vegetation damage (40% in Mara and 70% in Amboseli) and too many people (40% in Mara and 30% in Amboseli) had the highest response in observed impacts. These results provide a good indicator for the management to act accordingly since there is a consensus that ecotourism should minimise impacts to wildlife, soil, vegetation, water and air quality, and emphasise respect for cultural traditions and activities of local people. The onus is upon the tour operators to ensure that they leave as few negative impacts on the destinations as possible. Being aware of the impacts and their actions should relate to one another. More radical solutions are necessary if the most environmentally sustainable tour operations are themselves to be sustained and encouraged.

Valentine (1992) puts more emphasis on the need for a clear management regime to enable ecotourism meet the sustainable criteria. Most tour operators to Mara and Amboseli are in the first two spectrums identified by Ziffer 1989. According to the spectrum, tour operators that sell nature are those who are unaware or uncaring about its impact as well as operators that are aware of impacts, do the minimum to abide by any management rules, and who do not seek to educate or change tourists' attitudes, but may provide information. Sensitive tour operators actively seek to educate tourists by providing information, influence tourists'

attitudes and behaviour and practise minimum impact tourism over and above management requirements.

ROLE IN EDUCATION AND ECOTOURISM MANAGEMENT

This can be supported by the current study which shows that over the last ten years, only 40% of the tour operators to Mara and 20% in Amboseli did not play any role towards education and ecotourism management. However, those who did, alluded to the following ways in which they contribute to education and ecotourism management: tour drivers, guides and customer service staff are trained and equipped with knowledge of ecotourism; participation in activities organised by the Ministry of Tourism; supported ecotourism initiatives; created awareness; and reduced vegetation damage by making fewer trips to the Reserve and Park.

These results suggest that most drivers as a result of their training are good at their jobs, especially in terms of driving, courteous behaviour and basic wildlife identification. Observational data suggest that most drivers are generally responsive to clients' questions but do not volunteer much information or interpretation. Training programmes for drivers and interpretive information could therefore become a significant tool in visitor management in Amboseli and Mara. Education and interpretation are central to ecotourism and provide a means through which tourists can actively learn about the environment and the cultures they visit. The 1990s witnessed a substantial increase in attention to the environmental performance of tourism enterprises and the promotion of environmentally friendly practices by the government and related agencies. In effect, this means addressing environmental performance and adoption of what is perceived as environmentally friendly management and operational practices. This greening of the ecotourism sector may be seen as a matter of sound economic and environmental good sense.

The operators conserved water (70% in Mara and 60% in Amboseli), saved bottles, cans and newspaper for recycling (60% in Mara and 50% in Amboseli), engaged in minimal impact practices in natural areas (60% in Mara and 80% in Amboseli), participated in a local environmental group (50% in both Mara and Amboseli) and attended meetings regarding environmental issues (60% in Mara and 40% in Amboseli). In view of the above, the environmental performance, management and operational practices of the tour operators therefore are very important strategies for ecotourism management and sustainable development in the two areas.

DEVELOPMENT AND MANAGEMENT PRACTICES

From this study, tour operators (80% in Mara and 70% in Amboseli) reported some development in the Reserve and Park over the last five to ten years. They cited reasons such as improvement of infrastructure, participation of local community in conservation and management as well as economic empowerment. This suggests that continued use without really taking into consideration the improvement and maintenance of infrastructure, will

threaten sustainable ecotourism. Proper physical layout of the necessary infrastructure in national parks and reserves is one major approach to controlling overcrowding in these places. While roads and tracks in the national parks and reserves should be all weather and comfortable, the design and construction should take the above factors into account. According to Nianyong and Zhuge (2001), ecotourism in nature reserves will depend on and also promote open and sustainable management of the reserves. The response to current management practices was divulged to be very good/ good by 70% of the respondents in Mara and 60% in Amboseli. Among the reasons outlined in respect to the management practices included: more participation by the locals, there was reduction on poaching, stricter rules on wildlife disturbance and off road driving was prohibited, overall management and community development improved, and there was a general improvement of policies. These results signify that good planning and management could do a great deal to alleviate the congestion, improve visitor enjoyment and relieve pressure on the most harassed animals. As ecotourism research, planning and policy studies address these and other questions, the economic geography of ecotourism-related operators will hopefully become clear and relations between the human and natural environment will improve.

CONCLUSIONS

Kenya's tourism is nature-based. In order to be sustainable, tourism requires conservation. Similarly, tourism provides badly needed revenues for conservation programmes. For Kenya, ecotourism is not exactly an alternative form of tourism. Rather, it represents observance of certain underlying principles including minimum environmental impact through dispersing visitors, keeping the environment clean through proper waste disposal systems and saving energy. A further dimension is the balance of power between the host and guest. A clearer understanding of this factor is important for the future development of the tour operator occupation. As ecotourism research, planning and policy studies address these and other questions, the economic geography of ecotourism-related operators will hopefully become clear and relations between the human and natural environment will improve. This study has been significant as it has attempted to explore the relatively little written literature on this subject in Kenya. More research is needed in relation to the role of tour operators in ecotourism initiatives not only from the Kenyan perspective but other developing countries as well.

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Conceptualising tourism policies in north Mediterranean mass destinations

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ABSTRACT

In a relatively short time after the appearance of the sustainability notion in the tourism field, it has become the common reference point in any public policy announcement. However, it remains largely undefined what constitutes sustainable tourism development. Relevant literature although rich in case-specific studies in different contexts, lacks to offer a set of guidelines for sustainable tourism policy making in mass Mediterranean destinations. Before developing a framework for policy making in these destinations, current policies and practices should be considered. A literature review on the topic of tourism policies -including sustainable tourism policies, rejuvenation and in general tourism related policies- was performed. Issues of importance to policy makers were revealed and the goals of the policies explored. They were all given a target related structure and were integrated in a common scheme indicative of known tourism policies in Mediterranean mass destinations. This framework offers a conceptualisation of tourism policies towards sustainability. The issues identified may be used to supplement the elaboration of a policy making framework for sustainable tourism.

1. INTRODUCTION

Despite the popularity of the sustainable tourism concept there is no unique and broadly accepted definition (Butler, 1999; Hall and Lew, 1998). This has led to a continuing debate around the interpretation of the concept. This debate rarely addresses issues related to policies and actions. Ioannides (2001) and Fyall and Garrod (1997) note that it is the vagueness of the concept which hinders its implementation. Instead of constantly redefining the term, focus should be placed on its practical dimensions and its translation into policies and actions. This, in turn, would feedback the interpretation and definition of the concept. However, such an attempt would be frustrated by the lack of clarity over what constitutes sustainable tourism development. Vera Rebollo (2001) emphasizes the lack of a set of guidelines for achieving sustainability in tourism. This gap is even more apparent in the case of existing mass Mediterranean destinations. Mass tourism had been considered for years as the opposite of sustainable tourism (Clarke, 1997) while there is also an inherent difficulty in trying to retroactively apply sustainability principles (Butler and Stiakaki, 2001: 286).

Ioannides *et al.* (2001) indicate that there is lack of studies for Mediterranean tourism in general, attributed to factors such as the fragmentation of the Mediterranean Basin in terms of governance, culture and administrative status.

In order to address the issue of policy guidelines for sustainable tourism in mass Mediterranean destinations, an approach based on existing tourism policies in these destinations, the academia's recommendations, and the general principles of sustainable tourism development should be considered. Such an approach would allow for experience capture in a framework consistent with the sustainability notion. The present research concerns the first part, that of the existing policies. The research aims to identify from the literature the ways in which north Mediterranean destinations are coping with their tourism development towards sustainability. The objectives are to highlight the issues of importance to policy makers in these countries, explore the goals of the policies, and conceptualize them in an integrated framework.

It should be noted that it is not the aim of the research neither to evaluate and compare policies among destinations nor to come up with the identification from the literature of the 'absolute' policy for sustainable tourism. Issues of evaluation and comparison would necessitate a different approach on the examination and the analysis as well as the use of tools such as indicators and benchmarking. It is not either the perspective of the research that there is a single path to achieve sustainability even within a single destination.

2. METHODOLOGY

The research was based on secondary analysis of the literature on the topic of tourism policies in the Mediterranean. Both, generally stated tourism policies and explicitly sustainable tourism policies, were examined. Literature on sustainable tourism policies in the Mediterranean, although having received attention during the last few years, is still limited. It was felt necessary that all policy issues of interest in Mediterranean tourism be addressed. If only explicitly termed sustainable tourism policies were examined, at the present, it would be possible that shortcomings would jeopardize the validity of the result. Although sustainable tourism as a term has appeared during the last decade, environmental protection and rational development patterns were common sense between scientists, even before its appearance. Butler (1999: 8) argues that the sensible use of the environment has been the concern of every geographer. Therefore, it may be the case that when certain policies were initiated the term 'sustainable' had not been broadly introduced in the tourism field however had a relevant orientation. Moreover, it has proved a tricky task to sort existing policies in sustainable and more general tourism policies. This is illustrated when reviewing the literature. The same policies are examined in different contexts by different authors. Tourism policy in the Balearic Islands, for example, is examined by Knowles and Curtis (1999) and Vera and Rippin (1996) in a life cycle context, by Hunter-Jones *et al.* (1997) and Bardolet (2001) from the sustainability perspective, and by Ivars Baidal (2004) as tourism policy in general.

In any case, sustainable tourism has become the overarching paradigm (Hunter, 1997) for every national, regional or local government to address the future of its tourist development. Without suggesting that every policy is a sustainable tourism policy, and in correspondence to Hall and Jenkins' (1995) rational on tourism public policy, sustainable tourism policy may be viewed as what governments choose to do or not to do in respect of sustainable tourism. This may imply an inconsistency of what is meant with sustainable tourism in each case, and therefore of the goals of each policy. However, this is actually supportive of the vagueness of the concept. It is the objective of the research to identify and conceptualise the different approaches in managing tourism towards sustainable development.

Robinson (1996: 407) notes that although "tourism policy may be loosely identified as the sum of measures, laws and government intentions directed toward the tourism industry and tourist activity, tourism is also influenced by a vast range of other policies which apply to all elements of the tourist system". Policies affecting tourism are indeed fragmented in most countries, among various agencies, ministries and authorities each of them representing a parameter of the tourist system or a level on the public policy making process. It would necessitate a considerable amount of time and effort to collect and analyse all the documents from all the involved policy making bodies in each Mediterranean country. Instead, the academic work of acknowledged researchers found in the literature was used. Undoubtedly this suggests that there may be policies not documented in the literature and therefore not considered in the performed overview. This is believed to be compensated by extending the scope of the review to include different contexts. Literature referring generally to tourism policies, to sustainable tourism policies, as well as rejuvenation policies in mass Mediterranean destinations was considered.

Rejuvenation/restructuring in Mediterranean destinations literature was considered because the process revealed that much of the literature on Mediterranean tourism policies was related or under the title of restructuring/ rejuvenating strategies. In any case, when the aim is to retrieve policies on mature destinations, life cycle theory could not be excluded. As the present research reveals, rejuvenation is in the core of every policy undertaken. Overemphasized or not, misinterpreted or not, within sustainability, it surely comprises a major part of the policy formulation in these destinations.

Policies reviewed included Spain (Morgan, 1991; Amor *et al.*, 1994; Vera and Rippin, 1996; Bull, 1997; Hunter-Jones *et al.*, 1997; Priestly and Mundet, 1998; Knowles and Curtis, 1999; Pridham, 1999; Bardolet, 2001; Sastre and Benito, 2001; Ioannides, 2002; Barke and Towner, 2004; Ivars Baidal, 2004), Greece (Pridham, 1999; Andriotis, 2001; Buhalis and Diamantis, 2001), and Cyprus and Malta (Lockhart, 1997; Vera Rebollo, 2001; Ioannides, 2002). France and Italy are not appearing in the study although having a great share in Europe's tourism. The reason is that they are not often found in the literature referring to coastal mass tourism. Especially France's contribution to Mediterranean coastal tourism counts only for a small share (Bramwell, 2004) although the large share it holds in European tourism.

The findings are presented in Figure 1 on a common scheme, which has a hierarchical structure. On the upper level there is the *overall aim* followed by two *policy goals*. Under each policy goal there are the *objectives* to be achieved followed by the respective *strategies*. At the lowest level there are the *specific actions*. These are more case specific, and a selection of them from the literature was placed in the figure for illustration purposes. The hierarchical structure was adopted in order to facilitate the presentation of all the policies under a common scheme on a target related basis, to better illustrate the relationships between various issues even though these relationships were not always acknowledged in the policies themselves, and to compensate for generalizations made between the policies at different levels and different settings.

Although the ‘mapping’ of some policies in this framework was not always clear and therefore, some interpretation had to be adopted, it was felt that it could help in understanding the rational of the policies and ultimately their placing in an integrated framework. This approach reveals the issues, which are perceived to be important by policy makers, and offers a working framework for elaborating policy goals for managing Mediterranean tourism. It is a graphical representation of the interpretation and the integration of the examined cases. Not every policy examined follows this framework exactly, however, all policies adhere to one or more parts on it. Some, for example, place emphasis on the new diversified product, while others seem more rational in acknowledging the important contribution of the mass tourism. However, they all fit in the rejuvenation-competitiveness-quality-diversification scheme. In the next sections, the most important aspects for comprehending the framework are discussed.

3. RESULTS - INTEGRATION OF POLICIES

3.1. OVERALL AIM

It could be argued that all of the policies examined here, even if not explicitly stated so, had as their ultimate aim the rejuvenation of the destination and its tourist product. Rejuvenation was thought as the step in their life-cycle to take as in most cases it was felt that these destinations had reached a mature phase. A down-turn in numbers of foreign visitors or stagnation of expenditures for the same or even increased numbers, concentration of the activity in time and space, and deterioration of the environment are among the most common problems Mediterranean destinations are facing. Problems are faced along with, the emergence of new destinations worldwide and at a moment that mass tourism resorts are found themselves with an oversupply of accommodation and other infrastructure, making reaction imperative.

Rejuvenation in mature destinations is thought of as essential in order to enhance their competitiveness in the market and sustain their activity. ‘Quality’ has appeared as one-way road for achieving the desired rejuvenation. Quality has actually a two fold meaning here,

a better quality for the traditional tourism product and a new quality product to attract 'quality' tourists. This dual interpretation of quality actually reflects the two main goals of the policies that were examined.

3.2. GOALS – OBJECTIVES – STRATEGIES

3.2.1. Consolidation of mass tourism

Consolidation refers to supporting and nurturing the traditional tourist product (Garc_a-Falc_n and Medina Mu_oz, 1999). In the policies examined, the consolidation of mass tourism is addressed by upgrading its quality. This is achieved by improving the product and controlling growth which might threaten the capacity of the area and the satisfaction of the visitors. In this way competitiveness is enhanced while improvements are also available for new products and new markets. For improving the product offered strategies such as professionalization of the industry to offer better services, beautification of the resorts and environmental protection are mainly used. It becomes apparent that the strategies for consolidating mass tourism may have a positive impact on the goal of attracting new upper quality tourists, indicating a synergy between these two policy goals which is lacking proper attention in the policies examined. For controlling growth, mainly building controls are legislated. This is in order to limit oversupply, especially of low category accommodation, which might increase dependency on tour-operators and thus jeopardize the prosperity of the activity (Sastre and Benito, 2001). Therefore these two strategies -i.e. reduce overdependence on T-O and building controls- are somehow interrelated although they have not been examined in any policy as if. Marketing seems to preoccupy policy makers and stakeholders as far as the wishing new, diversified image of the destination is concerned. Although it has also been referred in the case of the traditional mass tourism in order to attract different origin markets and thus reduce overdependence on a single market (Morgan, 1991), it is often confused with the targeting of more wealthy visitors, which is actually a target for the 'quality' tourism policy.

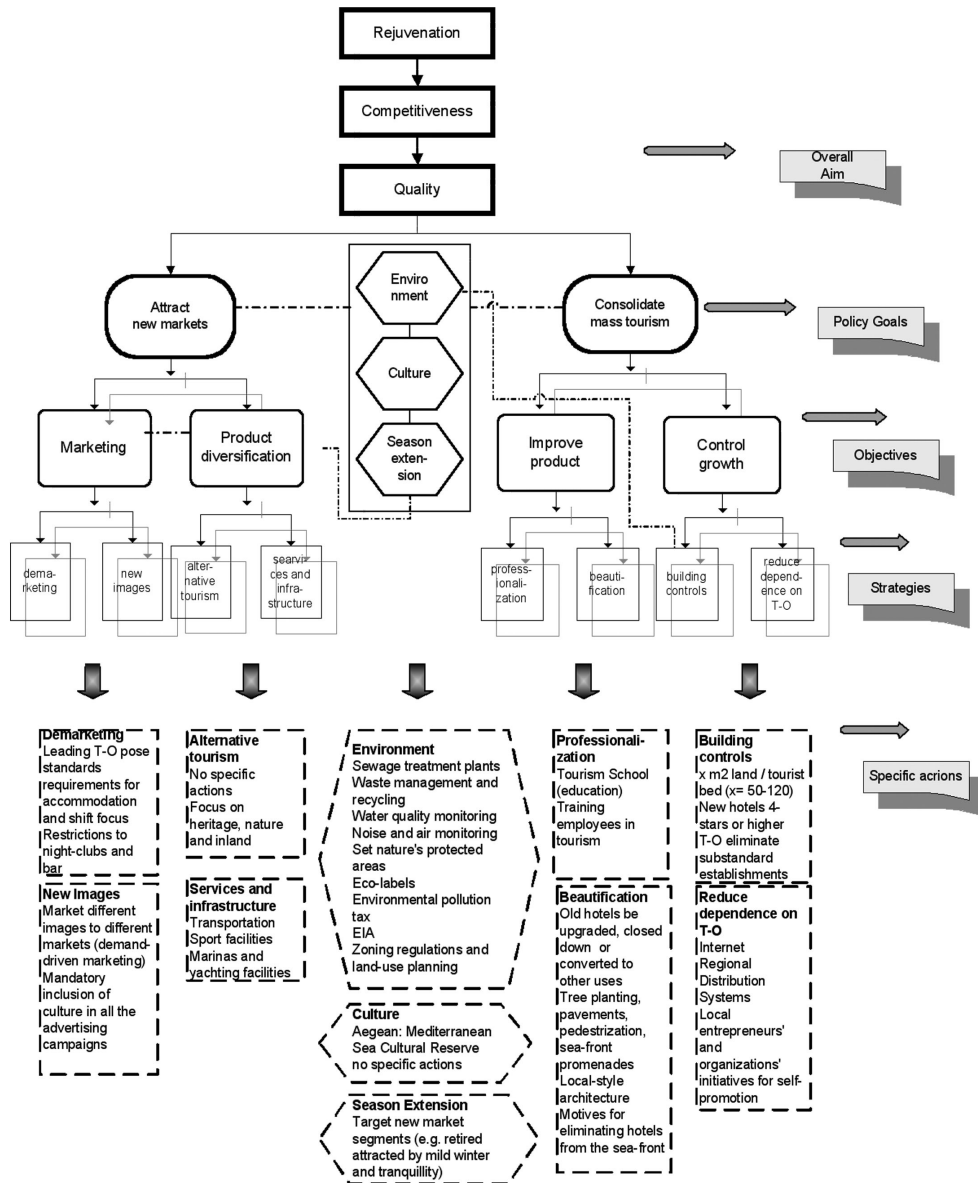


Figure 1: Conceptual framework of policies

3.2.2. *Attract new markets*

Quality is viewed here in terms of attracting 'quality' tourists, namely, high-spenders. These tourists will require top class infrastructure, culture, and a pristine environment. Therefore, new facilities and new products have to be developed. These new diversified products are mainly oriented to alternative forms of tourism in inland, less developed areas, to cultural and environmental attractions, and to new services such as spas, conventions, golf courses, and marinas. Marketing is considered essential for promoting a new image for a place and for targeting new wealthy visitors while at the same time demarketing it from its traditional customers with undesired characteristics (Morgan, 1991). Although, marketing is important and also influences mass tourism, it is mostly considered in attracting new markets for their new image, which is translated -according to the authorities, stakeholders and policy makers- to the high-spenders.

What it is not emphasized is the interrelation –and ultimately the distinction- between the improved quality of the mass tourist product and the pursuit of new 'quality' markets. It is conceived as if improving the quality of the mass tourist product will result in attracting new wealthy market segments, and a place can therefore abandon the large numbers and their current markets. It is as if policy makers are not taking into account the fact that the same mass market has perhaps become more demanding (Morgan, 1991; Poon, 1993; Garc_a-Falc_n and Medina Mu_oz, 1999) and the quality product is essential to maintain this market, as well as the evolutionary pattern which wants mass tourists to follow in the area where first had been the few adventurous or wealthy (Plog, 2001, Butler, 1980).

Besides the aforementioned, there are policy goals that have an impact or are means of implementation in both directions. These are environmental protection and conservation, the emphasis on culture and heritage, and the extension of the season. While they can be found as main policy goals, they are actually used as strategies for achieving the upper-quality diversified tourist product.

3.2.3. *Culture - Environment - Seasonality*

The need for protecting the environment and taking remediate actions to reverse deterioration and the promotion of local culture and heritage are the two goals included in every single strategy, no matter if it aims at attracting new markets or consolidating the traditional product. In any case, culture and the environment seem to be seen as the solution to the encountered problems, and resources to be exploited for attracting the new tourists and offering an improved product in their traditional market. Policy-makers, in every single case-study, felt somehow obliged to highlight the neglected heritage and preserve the naturalness of their resorts. It is not argued that these are not important aspects and that should not be included in sustainable tourism policies. However, the uniform agreement that culture and heritage is the solution to a declining market, raises certain question marks on the rational

behind this approach. In the framework illustrated in Figure 1 these are placed separately but within the two major policy goals, indicating their strong relevance to both as well as the confusion over their treatment as a goal or strategy.

Strategies for the environment include conservation and protection measures as well as land-use planning practices. However, strategies which have a positive impact to the environment and may have been enacted within environmental regulation frameworks have been included here in the beautification and building controls strategies. The latter raises the issue of the fragmentation of policies and the need for multidisciplinary co-operation of agencies under a coherent policy. As long as culture is considered, no specific actions were documented except for a constant call for its promotion and inclusion in advertising campaigns. An exception is the proposal of the Greek Ministry of Culture to designate the Aegean Sea as a Mediterranean Cultural Reserve (Vera Rebollo, 2001).

Although extending the tourist season is most often considered to be the goal of many tourism policies, the purposes behind it are not always the same. In the case of the Balearic Islands for example, seasonality's elimination through an off-peak season strategy is aimed at limiting tourism growth in the summer months and distributing numbers of visitors more evenly throughout the year (Bardolet, 2001). In Cyprus the aim of the season extension strategy was to reposition the island away from the sun, sea and sand product and attract new markets based on a diversified tourist product (Ioannides and Holcomb, 2001). Malta, on the contrary, targeted new markets (German and Scandinavian which are additionally considered affluent) to compensate for seasonality and to achieve higher occupancy rates (Ioannides and Holcomb, 2001). Seasonality thus, is viewed in a different way in each case, although featured in all policies. No matter which is the view, extending the season would involve the supply of new activities for the winter months and therefore a more diversified product. However, a diversified tourist product could be considered as a complementary policy for controlling the growth of mass tourism while it remains confusing the issue of what are the numbers targeted for off-season tourism. Additionally, given the arguments that there are positive aspects in tourism seasonality (Murphy, 1985; Shaw and Williams, 1994; Black, 1996; Boissevan, 1996; Selännemi, 2001), it should be re-examined as a target and under which policy goal it should be placed.

4. DISCUSSION

The issues which emerge as important to policy-makers in the case-studies examined, are more or less those appearing in Figure 1. Among them, competitiveness, and the emphasis on quality and on a diversified product based on culture/heritage are unanimously their focus. It is not the case that the whole scheme has been applied in every case. The Balearic Islands represent the closest example to it and at the same time is the one referred as the most successful in implementing sustainable tourism (Hunter-Jones, 1997; Bardolet, 2001; Ioannides, 2002). In the case of the Balearic Islands, quality is used in a more rational manner

and the wishing component is to offer a quality product which will allow them to be more competitive in the market they are already in, as well as be able to better promote their destinations to an 'upper quality' clientele. This clientele is not necessarily the 'rich' one but a different one and therefore the Balearics manage to refer to different market segments. In most of the other areas, however, which address only parts of the framework, such as Malta and Cyprus, the quality target is translated to attracting the few and rich. Although this target may be eligible for a newly developing destination, it is arguable whether it can form the main market of existing mass tourism destinations (Ioannides and Holcomb, 2001; Selänniemi, 2001). Moreover, if Plog's (2001) and Butler's (1980) ideas about the evolution of a resort area are considered, it is questionable whether even the new destinations will be able to maintain this single market over a long-term period without compromises and major interventions to save it for as long as possible.

The examination of the case-studies also revealed that all of the strategies were problem-driven, meaning that they were reactions to acknowledged problems related to the tourism activity on the area. Although this is not a practice to be criticized, it is argued that a combination of sustainability principles and a problem elimination approach would contribute to a solid and coherent framework taking into account all important aspects in a manner consistent with the notion of sustainable development. Authors such as Agarwal (2001), Garc_a-Falc_n and Medina Mu_oz (1999), Buhalis (1999), provide examples of approaches to planning and policy making which consider both the problems of specific destinations and the conceptual framework of sustainability. In the case-studies examined here, this shortcoming is reflected on the failure to address issues of importance to sustainable tourism in the Mediterranean.

For example, the role of small and medium size tourist enterprises (SMTEs) which account for a large share among the lodging facilities in the areas examined, implying both constraints and opportunities for sustainable tourism, is addressed in the policies as far as the control to reduce oversupply of low standard accommodation is concerned. Local participation in the planning and decision-making process is another issue which, although has attracted attention researchers' attention, even in the context of existing mass tourism destinations (Garc_a-Falc_n and Medina Mu_oz, 1999; Vera Rebollo, 2001), is not addressed in any policy. Not surprisingly, the issue of diversification from tourism, which calls for the development of other than tourism activities (McElroy et al., 1990; Williams, 1993; Komilis, 1994; Shaw and Williams, 1998; Buhalis, 1999; Garc_a-Falc_n and Medina-Mu_oz, 1999; Ioannides and Holcomb, 2001), is not addressed as policies lacked an integrated approach to sustainable development, focusing on the competitiveness of the industry.

This failure may be further attributed to the lack of coherence and coordination in the overall process of tourism related policy making. It seems that most policies were fragmented among a number of different planning frameworks from different public bodies, while coordination between of them is not apparent.

5. CONCLUSIONS

The aim of the research was to identify and conceptualize policies for sustainable tourism. The approach was based on reviewing the literature on tourism policies in various north Mediterranean destinations. Analysis revealed common goals and practices to set the common field as well as differences and then all the policies were integrated in one framework indicative of the interests of policy-makers.

The outcome is rather the ideogram of known policies rather than the '*should be*' framework. Before adopting, rejecting or altering the scheme, further research has to be carried out on the emerging issues. First, compatibility with sustainable tourism principles should be examined. This becomes more apparent because of the fact that many of the policies were baptized 'sustainable' in the course of time. Therefore, those issues which emerge as important for policy makers should be examined in sustainability terms. Moreover, other issues which have not been included in the policies but are of importance for sustainability, should also be considered. Finally, interrelations between the different goals and strategies should be examined as well in order to detect in which way one might have an impact, both positive and negative, in another.

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The Identification of Costs and Benefits, and the Control of Risks in the Cruise Ship Operations

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ABSTRACT

The paper examines the different categories of cruise ship costs. Attention is focused upon capital, and running and operating costs, in the hope that they can be reduced to improve the performance of the company. The costs are examined in the context of the different cost categories aboard the cruise ship, including the five phases of cruise operation from the time the passengers embark to when they last depart. A cost-benefit analysis is carried out in order to identify the cost elements arising from each cost category involved in the examined operation phase, namely 'cruising', and estimate the benefits for each cost element. Risk analysis is another issue that is examined. Risk assessment techniques are studied and the risk criteria for determining whether a risk is acceptable or not, are established. The proposed cost, benefit and risk assessment methodology is developed in the light of decisions of the cruise companies about the safe, economic, efficient and effective operation of their cruise ships. A test case is finally used to demonstrate the application of the proposed methodology.

1. INTRODUCTION

The cruise ship and the associated items bought for its future operations are generally capitalised, that is, they are considered to be a long-term acquisition and therefore not something consumable. The initial outfit of a new ship may include some items, which are normally considered to be consumables but are included initially as capital costs, such as the chart outfit and the original lubricating oil charge [Downard J. M., 1997].

However, once one considers the capital costs and setting up of departments on the ship and ashore, it remains for the total costs of running the ship, i.e. the "Running Costs", to be estimated. They can then be presented to senior management and operators for inclusion in their voyage costs calculations. According to John M. Downard [Downard J. M., 1997], it is at this stage that an allowance for the ship's depreciation and any interest charges are often added to the running costs, although these are outside the control of the ship manager. Capital items, shown as assets in the Balance Sheet, can be reduced by the cost of depreciation at each accounting period until paid for and considered fully used, but will be shown as an asset at a nominal or resale value. The interest charges, which influence the cost of bank loans, are paid on an annual basis and in accordance with the agreement made between the owner of the company and the banks or financial institutions.

Risk assessment is typically applied as an aid to the decision-making process. As options are evaluated, it is critical to analyse the level of risk introduced with each option. The information generated through risk assessment can often be communicated to the organisation to help affected parties understand the factors that influence the decision. Risk assessment is not a new field. Formal risk assessment techniques have their origins in the insurance industry [American Bureau of Shipping, 2000]. Since the 1980's, more and more governmental agencies have required the industry to apply risk assessment techniques. For instance, the U.S. Environmental Protection Agency requires new facilities to describe "worst case" and "expected" environmental release scenarios as part of the permitting process [American Bureau of Shipping, 2000]. Also, other industries such as Maritime, Offshore Oil and Gas Sectors, and many researchers have applied risk assessment techniques in their fields [Arnold K., 1997; Henley E. J., 1992; Sohal B., 1999; Wang J., 1999; Wang J., 1994].

2. THE GENERIC CRUISE SHIP COST CATEGORIES

A cost is the value of the economic resources used as a result of producing or doing something [Harper W. M., 1995]. Cost, therefore, can be mathematically stated as:

$$\text{Cost} = \text{Usage} \times \text{Price}$$

This means that costing involves ascertaining both a usage figure and a price figure. Costs can relate to things other than cost units. They can refer to individual parts of the organisation. Any part of an organisation to which costs can be charged is called here a cost category.

The relevant studies carried out on containerships [Wang J. & Foinikis P., 2001] and on formal safety assessment of cruise ships [Lois P., Wang J., Wall A. D. & Ruxton T., 2004] offer a useful guide to developing a generic cruise ship cost category model. The generic cruise passenger ship consists of all technical, engineering, operational and environmental networks that interact during the transportation of passengers. This model has been broken into two basic levels of the cruise ship operations, which are described as follows:

Hotel Facilities

- a. Passenger: Passenger cabins, public areas, stairways and halls, outdoor spaces.
- b. Crew: Crew cabins, common spaces, service, stairs and corridors.
- c. Service: Passenger service, catering facility, hotel services.
- d. Task related: Car decks, tender boats, stern marina, special attractions.
- e. Entertaining: Casino, swimming pools, cabaret shows, disco, shore-excursion office.
- f. Others: Shops, beauty saloon, internet, self-service, laundrettes, medical centre, photo shop, sporting club.

Ship Facilities

- a. Comfort Systems: Air conditioning, water and sewage, stores.
- b. Machinery: Engine room, pump room, steering and thrusters.
- c. Tanks, Voids: Fuel and lubricated oil, water and sewage, ballast and voids.
- d. Outdoor Decks: Mooring, crew.
- e. Safety Systems: Lifeboat, life raft, sprinkler system and fire fighting equipment, detectors and alarms, low level lighting, life jackets.
- f. Navigation and Radar Systems: Bridge navigation equipment, bridge radio/satellite equipment, passenger radio/satellite equipment.
- g. Others: Car decks, tender boats, stern marina, special attractions.

One way to identify the cost elements charged to different cost categories aboard the cruise ship is to combine the two generic functions mentioned previously in the different phases of cruise operations. The five phases of a cruise ship operation that will be assessed are the following:

- Passengers embarkation
- Getting underway
- Cruise, sailing
- Docking
- Passengers disembarkation

It is also important to classify the ship and hotel generic functions into different cost categories, and describe the services or facilities offered to the passengers and crew during the five operation phases.

The total costs of the ship's cruise are derived from all the departments, which are involved in the cruise operation phase. Some costs incurred during the cruise may belong to an individual cost category, and, in some cases, there are costs that belong to more than one cost category. To combine the costs of the different departments, the cost elements for a hypothetical cruise ship may be classified into the following categories:

Ship related costs: Port costs, bunkers, insurance, repairs and maintenance, deck and engine stores.

Crew related costs: Crew wages, overtime, vacation, sickness, social security, insurance, training.

Passenger related costs: Food and hotel, entertainment, security, insurance.

Administration and general costs: Communication, medical, general.

3. PROPOSED METHODOLOGY

The proposed methodology may be an important tool for cruise companies in studying their ships' costs, estimating the benefits associated with each cost element, investigating the possible areas of cost reduction and control, and assessing the ways in which hazardous events may influence costs. The stages of this process are described as follows:

1. Define, or breakdown the plan/process into its elements by drawing a flowchart or list of activities and events.
2. Study the cost and benefit associated with each element.
3. Model cost elements. The cost elements are classified into four categories, namely ship, crew, passenger-related costs, and administration and general costs. In this step, a possible annual rise for each cost element is estimated and a controllability factor is used. A controllability factor is a level within which each cost element can be controlled and is expressed in percentage terms. Areas of possible control are also exercised.
4. Rank the cost elements in terms of impact of their potential success/failure on the whole process and assign weighting values to each element. This can be done by estimating the average controllability factor for each cost element and then assigning relative values to the cost elements being considered.
5. Estimate the likelihood and consequences of possible hazards. In this step, the importance of risks to a cruise company will be determined. The analysis will determine the tolerability of the risk level.
6. Propose control measures to reduce the risks associated with significant hazards.

4. A TEST CASE STUDY

Following the description of the stages of the proposed cost, benefit and risk methodology of cruise passenger ships, a test case is conducted in order to demonstrate its feasibility. The test case is limited to one phase of operation only, namely 'cruising'. This is because a full-scale trial application would be too large in volume. The test case is based on a hypothetical cruise company, namely "Byzantium Cruise Lines". The company has acquired a passenger cruise vessel from "Ex Builders". The ship will be used to perform seven-day cruises in the Eastern Mediterranean. Its main technical characteristics are as follows:

Overall Length: 175 m
Gross Tonnage: 17,000 tons
Net Tonnage: 12,000 tons
Cabin Capacity: 462
Berth Capacity: 1,200

Step 1: Define the Plan/Process

The first step will break down the process into certain elements by drawing a list of associated activities/systems during the phase of cruising, and also the cost categories that can exist.

Step 2: Study the Costs and Benefits

The purpose of the second step is to study the cost and benefit associated with each element identified in Step 1. The total costs of the ship's cruising include capital, running and voyage costs (Chrzanowski I., 1999).

The costs of cruising can then be divided into four cost categories. These are:

- a. Ship-related costs.
- b. Crew-related costs.
- c. Passenger-related costs.
- d. Administration and general costs.

Table 1 shows an analysis of the costs incurred under each category, and also the possible benefits associated with each cost element.

Cost categories	Cost elements	Benefits
Ship-related costs	a. Port costs	1. Reduced pilotage, tug and berthing fees.
		2. Fewer unnecessary costs.
		3. More efficient ship documentation.
		4. More efficient passenger documentation and handling.
		5. More efficient use of money.
	b. Bunkers	1. More efficient bunkering policy.
		2. More efficient routeing and speed.
		3. More efficient itinerary planning.
		4. More efficient machinery.
	c. Insurance	1. Fines for stowaways and breaches of immigration laws, drug related offences and personal injury claims are covered by the insurance company.
	d. Repairs and maintenance	1. Effective use of capital and operational funds through tight budgetary control.
		2. Greater availability of machinery and equipment.
		3. Less expensive emergency repairs.
		4. Effective use of labour, time and maintenance equipment.
		5. Higher staff morale.
		6. Increased forecasting ability and highlighting of weaknesses.

Cost categories	Cost elements	Benefits
	e. Stores	1. Cruise company may make significant cost savings in the purchase of stores for ship and passenger use through bulk purchasing contracts, by tightening inventory control and the use of computerised systems.
Crew-related costs	a. Crew wages, vacation, sickness and overtime	1. Reduction in crew costs through choice of flag and nationality of crew. 2. Reduction in number of crew by installing automated machines, which may lead to improved productivity.
	b. Social security	1. Employ crew who are subject to less overheads in the form of social security payments or leave benefits.
	c. Insurance	1. Increased level of comfort and satisfaction of crew.
	d. Training	1. Avoid training through the employment of crew with technical knowledge and experience.
Passenger-related costs	a. Food and hotel	1. Increased sales revenue. 2. Improved quality service.
	b. Entertainment	1. Provision of quality products. 2. Increased level of satisfaction of passengers.
	c. Security	1. Increased passenger safety.
	d. Insurance	1. Increased level of comfort and satisfaction of passengers.
Administration and general costs	a. Communication	1. Effective communication.
	b. Medical	1. Effective handling of injured and sick passengers.
	c. General	1. Provision of quality products.

Table 1: Cost and benefit estimates

Step 3: Model Cost Elements

The third step is to model cost elements, and to investigate the possible areas of cost reduction and control.

Table 2 identifies the cost elements of a cruise ship and also attempts to forecast their annual rise over the five-year period 2004-2008 in percentage terms. The table is subjective, depending upon an assessment of recent movements of the individual cost elements involved. In the third column, an estimate of the possible average annual control (i.e. controllability factor), which might be exercised over the cost element, is given. For example, Table 2 shows that the cruise company can expect to control 10% of port costs. Control can take a year or more to implement and may not be realised in direct savings. The last column of the table identifies

some of the possible areas where control might be exercised. The forecasts were obtained from the financial statements and cash budgets of the Cyprus cruise companies. The controllability factors were obtained by calculating the fluctuations in cost elements and by comparing the financial results from year to year.

Cost elements	Forecast annual rise (%)	Controllability factor-% (Possible Average Annual Control)	Areas of possible control
<i>Ship-related costs</i>			
a. Port costs	10	2 - 10	Adjusting cruise itinerary, agency costs, lobbying authorities for reduction of taxes.
b. Bunkers	5	5 - 10	Improving machinery efficiency, adjusting grade of oil, adjusting cruise itinerary.
c. Insurance	10 - 30	5 - 10	Accident/casualty avoidance, extent of cover.
d. Repairs & maintenance	5 - 15	5 - 10	Improved crew productivity, budgeting and inventory control of spares.
e. Stores	5	5 - 10	Inventory control, computerisation, re-use of lube oil.
<i>Crew-related costs</i>			
a. Crew wages, overtime, vacation and sickness	5 - 15	2 - 10	Selection of crew with low pay, reduction in crew with more efficient use, renegotiated contracts.
b. Social security	5	2 - 7	Extension of offshore terms of employment
c. Insurance	5 - 15	5 - 10	Effective work, safety and healthy organisation.
d. Training	7 - 10	5 - 10	Use of on-board training systems and use of staff with experience.
<i>Passenger-related costs</i>			
a. Food and hotel	3	3 - 8	The standard of service provided on-board.
b. Entertainment	5	4 - 10	The cruise product offered.
c. Security	10 - 25	5 - 15	Involvement of all company personnel, efficient use of surveillance equipment.
d. Insurance	5 - 15	5 - 10	Passenger comfort and satisfaction.
<i>Administration and general costs</i>			
a. Communication	5 - 20	5 - 10	Efficient use of communication systems, data exchange by electronic equipments.
b. Medical	5 - 10	5 - 10	Increasing prices charged to passengers, more effective use of medical equipment.
c. General	10 - 20	5 - 15	Documentation control, budget monitoring, project planning scheduling, reassessment of company's goals.

Table 2: Control areas with controllability factor

Step 4: Ranking the Cost Elements

The purpose of this step is to rank the elements into the hierarchy that reflects the impact of their potential success on the whole process. Table 2 can be used to rank the cost elements starting with those having the highest controllability factor. Then, a measurement weighting system can be used to assign relative values to the cost elements being considered. Before the weighting values can be used, it would be necessary to estimate the average controllability factor. It is assumed that the largest average controllability factor is 10%. This is shown in Table 3.

Cost elements	Controllability factor (%)	Average (%)
<i>Ship related costs</i>		
Port costs	2-10	6
Bunkers	5-10	7.5
Insurance	5-10	7.5
Repairs & maintenance	5-10	7.5
Stores	5-10	7.5
<i>Crew related costs</i>		
Wages, vacation, sickness and overtime	2-10	6
Social security	2-7	4.5
Insurance	5-10	7.5
Training	5-10	7.5
<i>Passenger related costs</i>		
Food and hotel	3-8	5.5
Entertainment	4-10	7
Security	5-15	10
Insurance	5-10	7.5
<i>Administration & general costs</i>		
Communications	5-10	7.5
Medical	5-10	7.5
General	5-15	10

Table 3: Average controllability factor (%)

The following are the weighting values to the cost elements being considered, based upon their importance to the cost control policy of the cruise company:

1	2	3	4	5
Least important			Most important	

The weighting system is used in order to help cruise companies, especially in the Cyprus cruise region, to make costing performance reviews more meaningful. This system can also be used by cruise companies with different controllability factors.

The above results can then be used to find the weights to each cost element.

Class intervals (%) - Average controllability	Weighting system
0-2	1
2.1-4	2
4.1-6	3
6.1-8	4
8.1-10	5

Using the above weighting system, the cost elements will correspond to the weights shown in Table 4. Multiple expert judgements can also be incorporated into the above analysis.

Cost element	Average controllability (%)	Weights
<i>Ship related costs</i>		
Port costs	6	3
Bunkers	7.5	4
Insurance	7.5	4
Repairs & maintenance	7.5	4
Stores	7.5	4
<i>Crew related costs</i>		
Wages, vacation, sickness and overtime	6	3
Social security	4.5	3
Insurance	7.5	4
Training	7.5	4
<i>Passenger related costs</i>		
Food and hotel	5.5	3
Entertainment	7	4
Security	10	5
Insurance	7.5	4
<i>Administration & general costs</i>		
Communications	7.5	4
Medical	7.5	4
General	10	5

Table 4: Weighting factors

It is obvious that all costs involved in the operation of the cruise ship are important. Table 4 shows that, according to the case examined, the most important cost elements are "Security" of passengers from passenger-related costs and "General" from administration and general costs. There is a growing cost element in ensuring passenger security against unlawful acts and terrorism. Some of this cost falls directly upon the shipowner in taking security measures on his ship, some arises ashore and must be met through port dues and other means. International Maritime Organisation (IMO) has produced a resolution recommending that

ship companies, port authorities, cruise operators, governments and crew should take measures in order to prevent unauthorised acts against passengers, and this is being put into law around the world. "General" includes shore-operating expenses for offices, subscriptions, seminars, media costs, advertising, brochures, public materials and other marketing material. "General" expenses are of great importance because they are spent for the smooth and efficient operation of the cruise company and its ship. Marketing costs depend on the structure of the market within which the cruise company is operating. Success in marketing is dependent upon weighting forecast returns against the cost of advertising and promotion. "Communication" costs are also important. The introduction of satellite communications has led to a revolution in the manner in which information may be transferred to and from cruise ships. These costs can be controlled by an efficient use of communication systems installed ashore and on-board cruise ships. Another area that needs attention is that of medical services. Cruise ships must necessarily provide medical services because passengers, crew and staff may suffer illness or injury during a cruise operation. Therefore, the cruise company will have to cope with medical costs since medical supplies and equipment must be provided aboard at all times. These medical costs can be controlled by the effective use of medical equipment and increasing prices charged to passengers for providing such services.

From Table 4, it can be seen that "Insurance" as a passenger-related cost is also important. This may be because there is an increasing concern in passenger safety because of unlawful acts and terrorism.

Ship-related costs are also of great importance. The "Stores" depend upon the size, type, area of operation and the company's purchasing and accounting policies. The cruise company may make significant cost savings in the purchase of stores for its cruise ship through bulk purchasing contracts, by tightening inventory control and the use of computerised systems. "Bunker costs" depend on various factors including the amount of time spent at sea, the speed adopted, the efficiency of the main machinery, and the grade and cost of fuel used. Reliability will be a great consideration in the choice of engine design, rather than economy and flexibility. The cost of "Repairs and maintenance" depends on the age of the cruise ship and machinery, and the repair and maintenance policy followed by the cruise company. The company can make sure that all the national and international rules and regulations are obeyed. The legislative obligations of maintaining a cruise ship to a certain standard of safety may lead to a minimum cost requirement. "Insurance" is also of paramount importance. It includes hull and machinery cover, P&I cover, passenger claims deductible, war risk, crime and loss of earnings cover. Insurance cover is largely provided on the basis of the ship owner's past record. However, underwriters are seeking to limit their risk by ensuring the quality of the items they are insuring. Age and condition of the owners' existing fleet are important to the hull and machinery underwriter for the purpose of determining a premium. In P&I insurance, emphasis is placed on the actual condition and operational standard of the cruise ship. Other areas that need to be considered include fines for stowaways, drug-related offences and personal injury claims.

Of the crew-related costs, "Training" and "Insurance" are the most important. Although

officers are required to hold certificates to fill certain positions in the cruise ship, some companies require them to undergo additional training. Such training may include shipboard management, ship handling simulation, safety and survival courses. The costs of these courses can be high but the benefits to the company are considered to be worthwhile. Crew can also be required to undergo training courses. This would enable them to carry out their duties in an effective and efficient manner and also help passengers in serious accidents. Training of crew and officers is necessary because, in some instances, crew have not responded professionally to accidents and could not prevent loss of the ship and lives. "Insurance" is also necessary for a cruise company to insure its crew and staff. Insurance costs can be high, but a healthy cruise company can reduce or control such costs by providing efficient and effective work safety training to its crew and staff.

Step 5: Estimate the Likelihood and Consequences of Possible Hazards

The purpose of this step is to establish a risk assessment by analysing the likelihood and consequences of possible hazards. The events that will be examined are chosen not only from the external environment but also from internal sources. It is therefore important to ensure that the full range of hazards is identified. These may include the following:

- a. Machinery defects.
- b. Poor maintenance.
 - a. Poor operation.
 - b. Poor housekeeping.
- c. Inadequate training.
- d. Delays in activities.
- e. Crew and passenger casualties.
- f. Material casualties.
- g. Environmental impact.

The examination of the frequencies and the consequences of the events occurring is carried out using the "Likelihood and Consequences Scales" as explained in Tables 5 and 6. Likelihood and consequences should be viewed not only within the context of current controls, which may detect hazards or prevent undesirable risks but also in the absence of such controls. This will serve either to demonstrate the importance of existing controls and thus justify their continuation, or to identify those controls which are no longer necessary or cost-effective.

A preliminary screening of the identified hazards can be done to exclude the extremely low risks from the review. There are three methods used to determine the level of risk: qualitative, semi-quantitative and quantitative [American Bureau of Shipping, 2000]. In this paper, due to the high level of uncertainty, a qualitative method is used where scales are employed to assess the consequence and likelihood of events occurring.

Likelihood	F	Description
Almost Certain	1	The event is expected to occur in most circumstances
Likely	2	The event may occur monthly
Moderate	3	The event may occur every season
Unlikely	4	The event may occur every five years
Rare	5	The event may occur only in exceptional circumstances

Table 5: Likelihood (i.e. frequency)

Consequences	S	Description
Extreme	1	Loss of lives, loss of vessel, extreme environmental impact, huge financial loss.
Very High	2	Extensive injuries, serious vessel damage, major financial loss, major environmental damage, missed voyages.
Medium	3	Medical treatment required, medium vessel damage, some environmental damage, high financial loss.
Low	4	First aid required, cosmetic vessel damage, no environmental damage, medium financial loss.
Negligible	5	No injuries, low financial loss.

Table 6: Consequences

Having considered the likelihood and consequences of individual hazardous events, the importance of risks to the cruise company can be determined. This is clearly shown in Table 7.

Having investigated the hazardous events, as shown in Table 9, the company can decide whether the associated risks are acceptable. This can be done by connecting the risk matrix in Table 7 with the HSE risk criteria (i.e. intolerable, tolerable, negligible) as shown in Table 8.

Events	Frequency	Consequence (F)	Level of risk (S)
Machinery defects	F2	S2	High
Poor maintenance	F3	S3	Significant
Poor operation	F1	S4	Major
Poor housekeeping	F1	S5	Trivial
Inadequate training	F4	S2	Significant
Delays in activities	F1	S5	Trivial
Crew & passenger casualties	F3	S4	Moderate
Material casualties	F3	S3	Significant
Environmental impact	F5	S1	Significant

Table 7: Risk matrix results

Likelihood	Consequences				
	<i>Extreme</i>	<i>High</i>	<i>Medium</i>	<i>Low</i>	<i>Negligible</i>
<i>Almost certain</i>	I	I	I	T	N
<i>Likely</i>	I	I	T	T	N
<i>Moderate</i>	I	T	T	T	N
<i>Unlikely</i>	T	T	T	N	N
<i>Rare</i>	T	T	N	N	N

Table 8: HSE risk criteria

I = Intolerable, T = Tolerable, N = Negligible

Table 9 shows that poor housekeeping and delays in activities are in the “Negligible” region. Poor maintenance, poor operation, inadequate training, crew and passenger casualties, material casualties, and environmental impact are included in the “Tolerable” region, while machinery defects are in the “Intolerable” region.

Events	Level of risk	Region
Machinery defects	High	Intolerable
Poor maintenance	Significant	Tolerable
Poor operation	Major	Tolerable
Poor housekeeping	Trivial	Negligible
Inadequate training	Significant	Tolerable
Delays in activities	Trivial	Negligible
Crew & passenger casualties	Moderate	Tolerable
Material casualties	Significant	Tolerable
Environmental impact	Significant	Tolerable

Table 9: Qualitative risk matrix

It is stated that risks, which fall within the ALARP region (Figure 1), will require a cost-benefit analysis. Even if risks fall within the ALARP region, they may still be acceptable if risk reduction measures are proven to be not cost-effective.

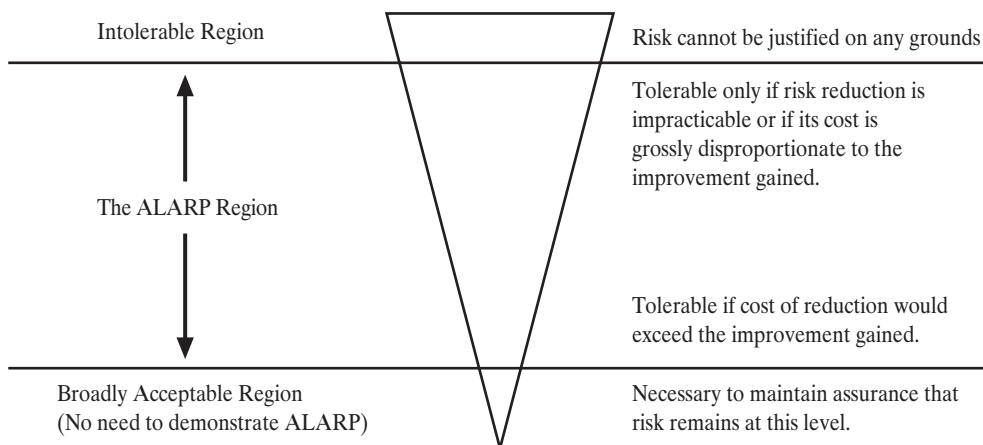


Figure 1: The HSE framework for decisions on the tolerability of risk
 Source: Kuo C., (1998), Wang J., (2002)

It is important, after the decision on the acceptability of risks and before the proposal of possible control measures, to determine the appropriate control strategy for the hazardous events that have been identified and shown in Table 10. For this purpose, it is necessary to combine Table 11 with Table 10. The results of this combination analysis show the most probable control strategies that may be followed for each hazardous event. These are shown in the last column of Table 10.

Events	Level of risk	Region	Probable control strategy
Machinery defects	High	Intolerable	Reduction or Avoid
Poor maintenance	Significant	Tolerable	Reduction or Avoid
Poor operation	Major	Tolerable	Reduction or Avoid
Poor housekeeping	Trivial	Negligible	Ignorance or Transfer
Inadequate training	Significant	Tolerable	Reduction or Avoid
Delays in activities	Trivial	Negligible	Ignorance or Transfer
Crew & passenger casualties	Moderate	Tolerable	Transfer, Reduction or Avoid
Material casualties	Significant	Tolerable	Reduction or Avoid
Environmental impact	Significant	Tolerable	Reduction or Avoid

Table 10: Qualitative risk matrix

Level of risk	<i>Ignorance</i>	<i>Transfer</i>	<i>Reduction</i>	<i>Avoid</i>
<i>Severe</i>	1	1	2	3
<i>High</i>	1	2	3	3
<i>Major</i>	1	2	3	3
<i>Significant</i>	1	2	3	3
<i>Moderate</i>	1	3	3	3
<i>Low</i>	2	3	3	3
<i>Trivial</i>	3	3	2	1

Table 11: Treatment plans

The action assignment used in Table 11 can be described as follows:

1 = Not possible, 2 = Possible, 3 = Probable

Step 6: Propose Control Measures to Reduce the Risks Associated with Significant Hazards

Having considered the risk levels and the appropriate control strategy for the hazards shown in Table 10, it is important to propose control measures to reduce the risks associated with the intolerable hazards. An attempt will also be made to suggest control measures for the reduction of the hazards that fall within the tolerable region.

The methods and measures that will be considered are partly based on the analysis shown in Table 2, partly on expert judgement, and partly on the author’s experience. The proposed methods and measures have been effectively used by a cruise company in Cyprus. They can also be used by any Cyprus cruise company, since cruise ships operating from Cyprus have similar features. The list of the proposed methods and measures is not exhaustive. The measures were proposed by considering the current status of the Cyprus and Mediterranean cruise market.

A. Machinery defects

This hazard is in the intolerable region (Table 10) and the methods suggested are outlined under the following three headings:

Management:

- a. Ensure that the machinery of the ship is subject to the rules of classification societies, who also widely act on behalf of “Flag States” in the survey and certification of equipment required under the relevant conventions.
- b. Ensure that all crew members involved take special training on the proper use of the machinery.

- c. Devise a policy on systematic repairs and maintenance of the machinery and make sure that it is communicated to all concerned.

Engineering:

- a. Adopt a computerised engineering system for preventive maintenance.
- b. Install a machinery monitoring system to provide data when the vessel is in service.

Operation:

- a. Implement a procedure for inspecting hull and machinery before departure and have alternative ways of verifying that this has been effectively done.

The following control measures refer to the hazardous events that fall in the tolerable region (Table 10):

B. Poor maintenance

Management:

- a. Devise a policy on systematic maintenance of machinery and other equipment used for the operation.
- b. Ensure that all crew members concerned are familiar with the company's policy and regulations.

Engineering:

- a. Install a system for measuring the performance of active machine equipment objectively.
- b. Perform analyses to identify potential areas of machinery failure and modify the design accordingly.

Operation:

- a. Implement audit procedures to ensure that maintenance is effectively done.
- b. Update maintenance-related documentation on a regular basis.

C. Poor operation

Management:

- a. Ensure that all staff and crew members are provided and are familiar with the ship's operation rules and regulations.
- b. Ensure segregation of duties (i.e. proper division of duties and responsibilities) to crew and staff members.
- c. Adjust cruise itinerary and destinations.
- d. Devise a policy for evaluating the employees' work.

Engineering:

- a. Install a computerised system to ensure proper and efficient use of operation equipment.
- b. Provide the crew with special training and use simulator systems for practising navigation in difficult situations.

Operation:

- a. Implement procedures for supervising the work of on-board personnel.
- b. Deal with passengers' comments and complaints arising from questionnaires.
- c. Carry out surveys of critical operation areas to identify possible failures.
- d. Try to improve the standard of service provided on-board.

D. Inadequate training

Management:

- a. Ensure that all crew members take special training in the operation of a cruise ship and its activities.
- b. Ensure that training is done regularly in an effective and efficient manner.
- c. Establish a set of procedures or standard methods to be used in training courses.

Engineering:

- a. Introduce new technology techniques in training crew members.
- b. Install fire fighting, safety and survival equipment to prevent serious accidents and damage.
- c. Install a continuous monitoring system to ensure efficiency and effectiveness in training methods and equipment.

Operation:

- a. Install language-teaching equipment to assist in overcoming the language barrier between officers and crew of different nationalities.
- b. Implement a procedure for inspecting training equipment before use and keep spare parts in case of breakdown.
- c. Ensure that specified training requirements are followed so as to avoid inadequate training.

E. Crew and passenger casualties

Management:

- a. Devise a policy on safe loading and training of crew members and passengers.
- b. Install a public address system to use for reminding crew and passengers of the company's and ship's policies, especially in emergency situations.
- c. Employ a safety officer with the appropriate knowledge and experience to deal with safety and fire matters.
- d. Ensure that the ship operates in accordance with the international safety regulations.

Engineering:

- a. Install appropriate equipment for fire fighting.
- b. Maintain a medical centre in order to avoid undesired situations.
- c. Install security systems to avoid violence and bomb threats.

Operation:

- a. Perform inspections and train people in the ship's procedures and in the use of equipment.
- b. Implement a system to ensure that procedures are followed by crew and passengers during the cruise.
- c. Observe the machines on a regular basis to ensure that they work properly.

F. Material casualties

Management:

- a. Devise a policy on safe loading of materials and supplies and ensure that it is communicated to all concerned.
- b. Adopt a policy of limiting the quantity of items to be taken onto the gangways.
- c. Ensure that materials are kept safely aboard while the ship sails.

Engineering:

- a. Install a continuous monitoring system to provide data on loading levels and distribution.
- b. Install high technology equipment to prevent fire and flooding situations.

Operation:

- a. Ensure that all the procedures for loading materials are properly followed.
- b. Enforce no-smoking policy to prevent material casualties.
- c. Ensure that the safety officer, other vessels and local port authorities are promptly notified in cases of material casualties.

G. Environmental impact

Management:

- a. Set up an environmental policy, which will be in compliance with the international regulations on environmental issues.
- b. Establish on-board anti-pollution measures and make sure that crew and passengers are fully aware of them.

Engineering:

- a. Use cleaning materials on-board and inspect public areas on a regular basis.
- b. Maintain a system of providing health and sanitation facilities.

Operation:

- a. Ensure that the ship operates according to the international environmental regulations (ISM Code).
- b. Ensure that the anti-pollution measures are used in an effective and efficient manner.
- c. Implement a system to check any changes or additions made in the ISM Code on environmental issues.

5. CONCLUSION

This paper has attempted a critical assessment of cost and risk levels as it applies to cruise passenger ships. Cost assessment has covered the possible elements in the cost categories of a generic cruise passenger vessel. A cost-benefit analysis is also carried out in order to study costs and the possible benefits. Risk assessment techniques are studied and the risk criteria to decide whether a risk is acceptable or not, are established. A test case study is used in order to demonstrate the feasibility of the proposed approach.

According to the analysis carried out earlier, the cruise companies operating in the Cyprus and Mediterranean cruise regions classify their costs into four categories. These are shown in Table 2. In the ship-related cost category, 'insurance' has the higher annual percentage increase followed by 'repairs and maintenance'. Insurance cost is very high for cruise ships operating in the Cyprus and Mediterranean regions because it is placed on the actual condition and operational standard of the fleet, which is very old. Since the cruise ship fleet is old, the cruise companies are enforced to repair and maintain their ships more frequently, and so the cost element of repairs and maintenance increases from year to year. Of the crew-related costs, 'Insurance' and 'Training' are the most important. The training is necessary for companies in the examined cruise regions because most of the crew and staff are not skilled and they have communication problems. Although the training costs are high, the benefits obtained from training are considered to be worthwhile. Insurance costs are also high, but a cruise company can control those costs by providing efficient work safety training to its crew and staff. 'Security' is the most important cost element in the category of passenger-related costs. This is because the cruise companies invest large amounts in this field due to the phenomenon of terrorism and unlawful acts. Of the administration and general cost category, 'general' costs have the higher annual increase. The companies pay attention to this element, and ensure smooth and efficient operation of their ships.

The possible areas of controlling costs are shown in Table 2, and the possible events (i.e. hazards) that may give rise to cost elements are explained in Step 5 of the proposed methodology. This paper has also attempted to propose control measures for the reduction of hazards, which may help cruise companies operating in the Cyprus and Mediterranean regions to reduce or control the cost elements described earlier.

The thoughtful application of cost and risk assessment techniques can improve the decisions made by a cruise company and result in improved performance in a number of areas by reducing cost and risk exposure. As awareness of cost and risk assessment increases, the benefits, which can be realised through its application, will continue to increase. Cost and risk assessment can be a useful tool to help cruise companies in the Cyprus and Mediterranean cruise region to make good decisions about the safe, economic, efficient and effective operation of their cruise ships.

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Hotel Animation and Professional Perspectives in Greece

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ABSTRACT

Hotel animation is an area of hotel services, which plays an important role for the attraction and satisfaction of resort hotel clientele in Europe. Most renowned resort hotels of the selected categories in Spain, Italy, Greece, Turkey and Cyprus, employ active young people known as “animateurs” for the organization and execution of activities offered mostly free of charge to adults and children in resorts. This paper discusses a viability study conducted in Greece aiming to reveal the need for professional services in this area. Literature review has shown that the demand for quality animation is going to increase, despite the problems that Greek and international tourism are facing nowadays. Results from a questionnaire survey with animateurs combined to interviews with hotel managers about animateurs as a profession, revealed the necessity of professional training and higher education in this subject. Animation can become professional if employers and educational institutions invest some resources and pay the required attention. Some practical and theoretical implications for the future are also discussed.

Key words: Hotel animation, tourism education, resort hotels, Greece

INTRODUCTION

Hotel animation is the combination of sports and cultural entertainment in resort hotels, initiated in 1980s in Spain, Italy, Greece, and later in Turkey and Cyprus. Many authors report the increasing need in professional staff for the administration of animation activities in the Greek holiday destinations (Laloumis, 1999 Afthinos et al, 2000; Glinia & Mavromatis, 2000; Lytras, 2001). Today in Greece 750 resort hotels offer animation programs (GTP, 2003). Although animation is increasingly important element of the tourism package today, the concept of animation is not treated in the English tourism literature (Pompl, 1983). This is perhaps the reason why there is not official information and research in this subject. Foreign employees are called to match the nationality of the clientele. A model for children animation, suggests overseas professionals to design and execute the services (Makens, 1992). As Lytras (1993) stated, the majority of the employees in this area are imported in

Greece because there is only limited interest by domestic work force. The German Office for Employment reports that German animateurs are the first category in employment exports (Bundes Anstalt fuer die Arbeit, 1999).

CURRENT SITUATION IN HOTEL ANIMATION IN GREECE

The hotel animation in Greece is full-grown product and requires a new strategy. This suggestion is based on following facts (a) during last decade renowned organizations (Club Med, TUI Preussag, ITC) expanded their business in the Mediterranean and Greece offering sport holidays. That indicates further demand and commercialization of animation (b) Official bodies refer to the professional profile of animateurs as: multi-skilled persons with a pedagogical and/or sports degree and background in languages, marketing -management experience and advanced communication skills (CEDEFOP, 2000; Instituto para calidad hotelera Espanola (ICHE)- Enero 1998 in Chaves & Mesalles, 2001). (c) Public and private schools, agencies and institutions have attempted to offer several courses in hotel animation in Greece during the last two decades. However, most of those attempts failed before they really could be established due to limited attendance (Lytras, 1993, pp. 108-112). (d) The quality of services in this hotel department is remaining below standard due to the lack of professionalism of the people employed as animateurs, especially in Greece (Costa et al., 2004; Glinia & Mavromatis, 2000; Lytras, 1993; Pompl, 1983).

The challenge in this service area in Greece seems to be: (a) To balance the demand and supply of qualified staff (b) to face orientation problems and operational difficulty (c) to explore the possibility of the development of professionals by preparing graduates from the sport and tourism educational institutions. In order to investigate the perspectives of hotel animation as a profession and to support decision making in this area, a viability study was designed. In this present paper animation professional perspectives are discussed.

METHODS

Methods for this study included: (a) review of relevant literature (b) interviews with individuals in charge for animation, belonging to the biggest hotel chains in Greece. Interviews referred on employees' mobility, performance and organizational structure of the animation departments. (c) A questionnaire survey in the entire country was initiated, which is still in progress. The questionnaire was addressed to the employed animateurs of a sample of 149 resort hotels in Greece. The questionnaire was based on the Job Descriptive Index (Balzer et al, 2000) and was translated in Greek, German, French and Italian language. It included six work attitude variables (i.e. work motivation, job satisfaction, job in general, life satisfaction, intention to quit and perceived work motivation) and six demographic variables (age, gender, level of education, working position, years of working experience, hotel category). Results of the questionnaire survey will be presented by the authors in a future paper.

RESULTS AND DISCUSSION

Profile of employers: the employers of the animateurs may be tour operators, hotels, or local tourist offices (Pompl, 1983). Almost twenty percent (20%) of some 750 hotels offering animation programs in Greece belong to the De Lux, A & B categories (beach, resort and club hotels). Only in Chalkidiki region (Northern Greece) 17 hotels with capacity more than 600 beds employ more than 80 animateurs for their day and evening entertainment. The entire establishments in the mentioned categories provide children facilities and children services (GTP, 2003). Literature review showed that two types of hotel animation exist: the “soft animation”, where hotel guests are more passive participants in the animation programs and the “active” animation, where animateurs use different motivation techniques in order to attract guests to join the activities. The latter type is becoming popular nowadays in the Greek tourism destinations. Additionally, interviews with the employers revealed that in the traveling period of 2003 more and more establishments in order to minimize costs turn their operation to an “all inclusive” basis. As a result hotels enrich the entertainment style with sports and games to become more intense and extend animation. That affects the quality of the product and the set of entertainment activities. Club hotels operating in all-inclusive basis, hire animateurs whose nationality match the nationality of their guests. In their case, the tour operator itself select, train, and place the animateurs in the hotels (Bourgignon, 1998). Also the Greek Tourism Ministry is aiming to consider qualified animateurs as a criterion for the stars classification system of the Greek hotels (Digridakis, 2001; Falirea, 2001).

Profile of animateurs in hotels: Animation is closely related to the personality of animateurs. As Pompl in 1983 wrote, the animateurs’ main duties are concerned with organizing the animation program that is offered in the holiday resort or club hotel. *“The animateur usually receives a fixed salary, and does not depend on commission. Talent and inclination are the main personal qualifications needed for the job of animateur. For while a sport, the rules of a game or the techniques of a hobby can be learnt, sympathy, the ability to make contact with people, sociability, social competence or creative skills are only acquired- if acquired they can be –through a long learning process....however an animateur who is bored and feels nothing but indifference towards the participants, does more damage than good to both business and guest. It is therefore essential to choose people carefully, according to specific criteria, just as it is essential to give psychological advice and supporting supervision”* (in Pompl, p.10, 1983). Later, Costa (2000) agrees with the previous author, pointing that has proposed that most animation skills can be taught.

Early information indicated that animation employment in Italy, France and Spain was in 1983 more than 50.000 animateurs worked (table 1). Because animateurs are a peripheral occupation, the precise number of employees is difficult to estimate (Choy, 1995). Assessments bring the general entertainment groups and associates for sports recreation employees up to 7000. However those data should be updated with the actual numbers. Today there is a high mobility and turnover rate of employees in this sector, which in some establishments account for about 80% every year.

Table 1. Number of amateurs reported in Spain, France and Italy

Country	Number of amateurs
Spain	25.000
France	8.000
Italy	13.000

Source: FIJET (1989), in Lytras (1993). *Tourism Psychology*, p. 108.(Eds.) Interbooks

Analysis of the demographic results of the mentioned questionnaire survey showed that employment in animation accounts for at least 2500 individuals as full -time hotel employees, almost half of them Germans. An important finding was that those employees are people of very young age (M=23.2 years), students or unskilled work force, and that they are mostly externally motivated to accept the job. Despite enjoying it very much, amateurs in the large majority are not professionals and they probably view the job as an opportunity to travel, which means a short-term interval in their professional life or even an orientation period before entering the challenging labor market. Majorities of workers in the 17 resort hotels in Chalkidiki region originate from Germany and other European countries from the former Eastern European block. A large part of those employees were self -taught in the animation subject. Another part of amateurs, have attended seminars for the development of their professional skills.

Education and training: There exist at least four agencies based in Germany, one in Italy and one in Greece that provide Greek hotels chains with animation personnel. Agencies offer scouting, orientation and counseling for those hotels, as well as training and preparation courses for the candidates, but they do not guarantee for the hotel animation product (Jakovlev, 1992). Managers stated that animation recruitment is very expensive and not always cost –effective. Sometimes there are barriers of language, tax - insurance and accommodation support problems with foreign workers. When hotels have limited budgets or low reservations, amateurs are the last people to be recruited and sometimes animation is reduced as a service.

Quality of Services: Organizational structures vary throughout the different destinations and establishments. Glinia & Laloumis (1999) found a clear distinction between club establishments and the rest. Many resort establishments are competing in terms of variety and quality of activities offered by clubs, especially in evening entertainment. Organizational practices as job descriptions task design, performance appraisal, on-the-job training and the likes are met by the few. Makens (1992) states that children are the most delighted customers regarding animation services. In a study by Costa et al, (2003) in selected resort hotels, participants perceived animation services as satisfactory in relation to their expectations. There existed minimal or no complaints about animation quality of services. Questionnaires provided by hotels for the assessment of animation service quality are subject to criticism, because they do not deal with the emotional impact of animation. Managers were somehow content, but

they insisted that costs were too high for the quality they gain from this department, stressing the evening shows. General Managers also admitted they themselves were not trained in animation management issues. All of the interviewees expressed the desire of having an advanced animation college course in Greece.

CONCLUSION

While animation is not regarded as a profession (probably because requirements for the job are not met by the most) there was clearly indicated by managers and experts that it has to become professional. Luxury hotels and resorts of the upper class provide animation services as a pull factor to their wealthy clients. Thus it contributes to the hospitality image of the country. Unsatisfactory animation services are causing problems and instability in the totality of hotel services.

Animateurs in Greece work only seasonally, that means a few months in their hotel positions. As most of them come from a different country, they are likely to go back home by the end of the season raising a high turnover rate. This can be explained firstly by the specific motivations of the animateurs, and secondly by the dissatisfaction that occurs when management competencies are limited and promises remain undelivered. Thirdly, despite physical skills animation requires also emotional and social skills and long working hours, which may be reasons for burnout in job (Pompl, 1983; Finger & Gayler, 1993). In contrast to other more regular hospitality services in hotels, such as cuisine and technology, animation may bring up very low quality results.

In comparison to other tourism employment areas, we can see animation as a seasonal hotel employee category comprised primarily by foreign workers. Other such groups are tour operator representatives and tour guides working in the entire tourism destinations in Greece. A third group that falls in the similar category is tourism guides for archaeological sites. Greek government has situated a school for archeological site guides, which could stand as a model for such an animation school. A consideration is that animateurs are the only full time group of employees controlled by hoteliers and relevant training should primarily match hoteliers' needs.

Conclusively, animation can grow to become a profession if employers and educational institutions invest some financial resources and pay the required attention. In order to reduce costs and diminish communication barriers, employers and bodies could activate the domestic animateurs "market". As a first step to activate domestic animateurs market, it is possible to create intensive courses for graduates from physical education & sport and tourism schools. An issue to consider may be the training of trainers for animation. Due to the nature of the job, trainers and teachers must seize adequate practical experience in this or close relevant topics, (see Crompton & Mackay, 1989; Edginton et al, 1992). Hotel management curricula must offer a far more professional insight in the animation occupation and its role in the hotel operation. Anyway, it is rather difficult for Greek candidates to compete with the

foreigners for employment in animation. Upon completion of the questionnaire survey authors will be able to explain more on this topic.

All in all, family holiday establishments are very much dependent on animation services for children and families. Currently, animation is very much in call as a marketing tool in the promotional policies for Greek and other resort hotels. As a result, the demand for professional amateurs will increase and such practices shall become more and more important for the hotel services competition in the future. This remark rationalizes this current interest in education and training for amateurs, animation teachers and trainers and managers. In order to respond to the challenges mentioned in the introduction, following suggestions can be made:

1. Animation job requires formal qualifications, despite some atypical skills (Opaschowski, 1996). The studies design should have extended duration and the content should be introductory in technical skills and functional skills. Communication training, psychology, empathy and human skills must comprise a significant part of the functional skills training.
2. An advanced management course should be designed for leisure and entertainment managers and for those with sufficient working experience in animation.
3. International educational programs by tourism, sports and art schools like European projects SOCRATES-Leonardo da Vinci, could be useful to develop in order to fill in the gap of training in foreign languages and cultures.
4. Also, electronic sources in educational material, methodology and training for managers and for trainers should be created for self- development and learning.
5. Animation service quality should become an issue for research by the state and professionals. Evaluation techniques should be further developed and supported by several qualitative methods.
6. Cooperation of the commercial and the public sector could reduce the costs of training and education in terms of providing facilities and physical resources.

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Authors'note:

The study was designed under the EQUAL project aiming to reveal employment opportunities for sports graduates (Greek Ministry for Employment, 2003). Possible outcomes upon completion of the study could be utilized by the higher educational institutions in sports and tourism and may affect their orientation policy.

Revising Porter's Five Forces Model for Application in the Travel and Tourism Industry

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ABSTRACT

This paper takes a new look at Porter's five competitive forces model. In doing so, this work proposes a new competitive forces model centered on the travel and tourism industry that includes two additional forces, namely information technologies and government regulations, and adds an additional element to the buyers' perspective, namely the power of intermediaries. This model is applied in the case of Greece and, although several limitations, from the findings it is proven as capable of explaining the competitive forces that affect the level of competition in the Greek travel and tourism industry.

Keywords: Porter's competitive forces, information technology, intermediaries, government regulation, Greece, travel and tourism.

INTRODUCTION

Several structural elements within the business environment affect the level of competition in an industry. To these ends, there is continuing interest by academics and practitioners to study the totality of environmental influences or conditioning that are outside an organization's boundary (Smith et al. 1980), and various models have been proposed and discussed (e.g. Henderson 1976; Smith et al. 1980) that examine the external environmental forces that impact on organisations.

However, up to now the most significant and dominant paradigm in the literature of industry analysis is Porter's (1980) competitive forces model. This framework proposes five potential forces of industry competition that have changed the way that managers, consultants and practitioners view the competitive environment (Slater & Olson 2002) and determine the profitability and the degree of attractiveness of a given industry, as has been reported by Blair and Buessler (1998) for the medical group industry and by Thurlby (1998) for the electricity supply industry.

Porter's five competitive forces that constitute strong threats to a company's profitability and when act favorably can establish the long run profitability of a given industry are (Hill & Jones 1995, 70-81; Porter 1980):

1. The rivalry among established companies that is a function of three main factors: industry competitive structure; demand conditions, and, the height of exit barriers in the industry.
2. The threat of new potential entrants that is a function of the height of barriers to entry that depend on three main sources: brand loyalty, absolute cost advantages, and economies of scale.
3. The pressure of substitute products that can limit the price a company can charge for its products and services.
4. The bargaining power of buyers. Buyers are able to force down prices or they may demand higher quality and better services which may increase a company's operating costs.
5. The bargaining power of suppliers. Suppliers are able to force up the price of their products or reduce the quality of products supplied which may decrease a company's overall profitability.

Since 1980 that the model was first introduced, a substantial body of research has been compiled that either supports, revises or complements Porter's basic premises. Among these studies Thyrby (1998) supports that Porter's model is static and ignores time. Likewise, Slater & Olson (2002) believe that although Porter's basic premises are valid, the five forces model is an incomplete representation of the market forces that influence industry and business performance.

The deficiencies identified at Porter's model are evident in the travel and tourism industry where its shape is changing and customers' needs and governments' responses change and evolve in a different way. As Evans, Fox & Johnson (1995) suggest:

Despite the optimism for growth in tourism, the industry is in a state of rapid change. Change is reflected by a variety of factors including new tourism products, regulatory changes, globalization, use of new technologies, environmentalism, increasing world debt, and economic cycles (p. 37).

Thus, the five forces model does not adequately address the changes having taken place the last decades in the travel and tourism industry. In addition, the model does not adequately include all actors affecting tourism firms' environment. Based on these deficiencies of the model, the overall goal of this paper has been set to complement, not replace, Porter's five forces model in respect to the travel and tourism industry. It does this in four sections. These sections cover: a discussion of elements not extensively addressed by Porter's original model but having direct influence to the travel and tourism industry; the delivering of a new competitive forces model explicitly for the travel and tourism industry; the application of the model in the case of Greece; and the conclusions and the implications of the study.

NEW ELEMENTS IN PORTER'S MODEL

As already mentioned there is a necessity to extend the five forces model to reflect developments and peculiarities of the travel and tourism industry. Therefore, this section discusses elements not addressed extensively in Porter's original model but having relevance to the level of competition in the travel and tourism industry.

INTERMEDIARIES

Nowadays, the disparities inherent in mass production and mass consumption have caused intermediaries to enter into the distribution chain between buyers and sellers (Wynne & Berthon 2001, p. 18). Traditionally, distribution in the travel and tourism industry is characterized by intermediaries that are actually buyers for the products and services offered by tourism businesses. Although intermediaries may be considered a part of the bargaining power of buyers force, due to the important role they play in the travel and tourism value chain, they may be considered as a distinctive element within Porter's power of buyers force. In particular, their power is evident from the fact that in 2000 tour operators had a share of 25 percent in the total international tourism market, meaning that they organized approximately 175 million international trips (Calvek 2000, p. 479). As Wynne & Berthon (2001) state:

The international tourism industry is characterized by large numbers of small suppliers who are globally scattered. In Third World destinations this is compounded by the secluded locations of many of the attractions, limited domestic markets and weak infrastructures. Likewise, tourists are numerous, diverse and are geographically separated from the suppliers... In response to these challenges, the industry has developed a complex value chain, utilizing the services of several intermediaries. In its simplest form, the chain members include the destination service provider, the inbound tour operator, the outbound tour operator and the local travel agent (p. 422).

Intermediaries, in the form of tour operators, organize a large number of trips from generating markets to foreign countries, and, as a result they are the middlemen that undertake the initiative to persuade clients which destinations to visit (Laws 1991, p. 120). Tour operating combines aircraft seats, beds in hotels (or other forms of accommodation), and other services and activities. The bulk purchase of the components of the tourist package allows individual packages to be competitively priced to the consumer on the basis of a high take-up rate of offers made (Cooper et al. 1998, p. 256; Goodall & Bergsma 1990). Thus, tour operators have a dominant position that derives from the fact that they are buying under conditions

of perfect competition but are selling under conditions approaching oligopoly (Klemm & Matin-Quiros 1996, p. 130).

The competitive advantage of the tour wholesalers lies in their doubly strategic position between all principal suppliers and between suppliers and consumers. Their power derives from the enormous volumes they can command, their pivotal familiarity with diverse market segments, and the capacity to shift tourist flows from one destination to another (Britton 1991, p. 457).

INFORMATION TECHNOLOGIES

Porter's traditional model did not recognize information technology (IT) as a distinctive competitive force, but IT was only considered as a means of supporting the five forces. This deficiency of Porter's model was reported by Schertler (1984) who attempted to analyze how IT can affect the five competitive forces. Likewise, McFarlan (1984) and Thurlby (1998) considered IT as a way to achieve competitive advantage and refined Porter's model to incorporate an IT dimension. As McFarlan (1984) suggested by adding to the product an IT context, could result in increased power of the organization, reduced cost and add value to the product. All these will create barriers to new entrants or substitute products to enter successfully the market. Therefore, IT has now been recognized as a force in its own right (Thurlby 1998).

In the increasing competitive environment that tourism companies operate, developments in information technology offer new chances to improve communication with consumers and business partners (Kuom & Oertel 1999). Tourism is one of the world's largest industries and has historically been an early adopter of new technology (Wynne & Berthon 2000, p. 421). Without question, IT is drastically altering the competitive environment of the travel and tourism industry and rewrites the rules of how companies conduct business and reach their customers (Connolly & Olsen 2000, p. 74).

Systems of information technology, that comprise of computers, computerized reservation systems, digital telephone networks, videos, videotext, teleconferencing, internet and management information systems (Poon 1989), have changed travel and tourism industry's structure and have created entirely new ways to do business. Since travel and tourism is an information intensive industry (Poon 1993), IT is the single greatest force determining competitive strategies (Connolly & Olsen 2000, p. 73).

Until recently, bookings have been predominately undertaken by telephone, but now bookings can be made electronically. For example, in 1981 approximately 100,000 hotel rooms were booked through Global Distribution Systems (GDS), although this number increased to around 33,000,000, in 1996, and is expected to rise even more in the years to come (Kuom

& Oertel 1999). In the airline industry, GDS account for about 80% of all airline tickets sold (Kuom & Oertel 1999).

IT increases choice and enhances relationships to each of the various sections of the travel and tourism industry (suppliers, tour operators, travel agencies and travelers). Home or business users can check out a broad variety of tourism and travel products and services, and thereby 'bypassing' parts of the established tourism value chain (Kuom & Oertel, 1999). Internet technologies offer a number of advantages to tourism businesses and is fast becoming an important new channel for commerce (Wynne & Berthon 2001, p. 18). The World-Wide Web (WWW) enables customers to access electronically up to the minute information and make price comparisons, independently of place and time. In case that one seller is out of stock or too expensive, there is no need to drive miles to an alternative competitor but just to find another one through Internet.

GOVERNMENT REGULATION

Yarborough & Yarborough (1990) suggest that governments define and enforce property rights and the rules of competition, and, as a result, affect the functioning of most industries and the relationships among market forces. In fact, a political dimension has an immediate impact at firms and each country's business environment. This is more evident in the travel and tourism industry, where government is a vital force initiating tourism expansion at a destination or country and creates the necessary infrastructure required for tourism development. To these ends, although somebody may allege that governments regulation can be included under Porter's new entrants competitive force, various strands of international tourism research demonstrate the need to include government regulation as a separate force driving industry competition, since change in regulation may call for a change in a firm's overall strategy (Rugman & Verbeke 2000, p. 378).

Governments have usually essential or even critical influence over the tourism industry by providing numerous services including infrastructure, transportation, security, overseas marketing, as well as funding of tourism projects (Andriotis 2000; 2002a; Elliot 1987), and, by creating the legal framework within which the tourism industry operates. In doing so, governments have the power to change travel and tourism industry's structure and create entirely new ways to do businesses by placing constraints around the way in which resources are used.

There has been considerable discussion about the nature of changes in governance, and their causes in the travel and tourism industry. In practice, there is likely to be a mix of government intervention in the travel and tourism business environment, since government regulations may be put into place, which either prohibit or encourage tourism. From one point, governments may seek to secure the adoption of measures to discourage tourism development and penalize tourism operators flouting the rules. From another point, government's financial

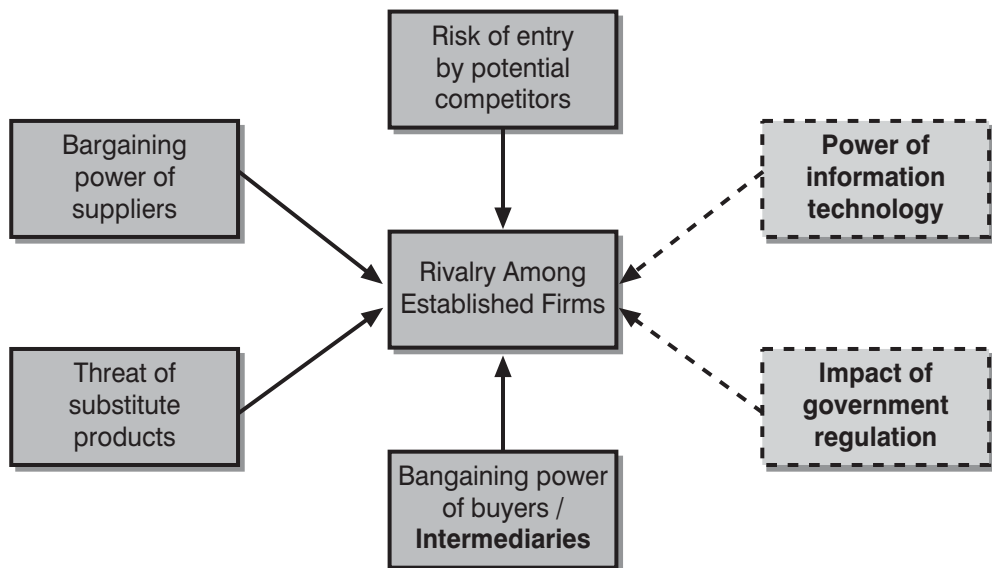
incentives can be used to expand the tourism industry. Likewise, deregulation of aviation can, and has been, used expressly by many governments as an instrument of change to shape tourism anew.

DELIVERING A NEW COMPETITIVE FORCES MODEL FOR THE TRAVEL AND TOURISM INDUSTRY

Before proposing a revised model of competitive forces, it should be stressed that the major notions of Porter’s forces are as valid today as they used to be 25 years ago. As a result, it is not our intention to challenge the points Porter made so effectively. Instead, this paper concentrates on forces that were not distinctive elements in the original model, as well as on new ways of thinking about the original forces.

In reality, due to changes having taken place in the travel and tourism industry, as well as the distinctive nature of the industry, it is necessary to revise the model in order to make it more relevant. In this respect, Figure 1 represents a revised competitive forces model, which reconfigures Porter’s five original forces by adding two more, namely the power of ITs and the impact of government regulation, and, by proposing an additional element to buyers perspective, namely the bargaining power of intermediaries.

Figure 1: A revised competitive forces model for the travel and tourism industry



Source: Compiled by Porter (1980)

This model will be tested in the case of the Greek travel and tourism industry. More specifically, to provide a critical analysis of the competitive forces in the case of Greece, this paper adopts a case study approach based on data collected through secondary sources. However, before going into detail in the case of Greece, it should be noted that in the travel and tourism industry there are different types of enterprises, such as: hotels, campings, travel agencies, airlines, shipping companies, etc. that may present differences when using the proposed model. As a result, the proposed model is tested in selected types of tourism enterprises within the Greek travel and tourism industry and, as a result, it is not proven that it can be used in the same efficient and effective manner in all markets of the Greek travel and tourism industry.

APPLICATION OF THE MODEL IN THE GREEK TRAVEL AND TOURISM INDUSTRY

Tourism plays an important role in the Greek economy. In 2002, close to 14.2 million tourists visited Greece, creating incomes of approximately €10.3 million (HNT0 2002). Association of Hellenic Tourist Enterprises (2003) estimates that approximately 810 thousand persons are directly involved in tourism activities.

Although the significance of tourism for the Greek economy, Greek tourism businesses face strong competitive pressures. For example, in 1996, a study by ICAP (1997) found that within 30 Greek travel agencies only 21 were profitable. Likewise, Moussios (1999) states that of the 7,500 hotels in Greece, some 6,000 are loss making. As a result, it becomes essential to investigate the forces that may drive Greek travel and tourism industry's competition and the associated negative results.

BARGAINING POWER OF SUPPLIERS

There are no Greek owned charter companies transferring tourists from tourism generating countries to Greece. As a result, airlines, as suppliers of transport services, can seriously affect the Greek travel and tourism industry by raising their prices. On the other hand, as far as the supply of labor is concerned migrant workers are prepared to receive low wages (Andriotis & Vaughan 2004; Lazaridis & Wickens 1999). However, migrant workforce is available only for low-level unskilled jobs, although high skilled professionals require higher payments. In the past, employees' strikes in Olympic airways, the national carrier, have forced the company to raise wages.

THREAT OF SUBSTITUTE PRODUCTS

Greek tourism businesses face severe competition. First, they compete with other tourism companies offering similar products or services within Greece. Second, they compete with other countries, which the tourists may choose to visit. The major competitive countries of Greece include southern European Mediterranean countries such as Spain, Portugal and Cyprus. In addition, the emergence of cheap destinations from north Africa (such as Morocco, Tunisia) and the eastern Mediterranean (Egypt, Turkey, and Syria), are seen as a growing threat, since Greece is not as cheap as it used to be in the past (Andriotis 2000; Buhalis 1998; EIU 1990).

RISK OF ENTRY BY POTENTIAL COMPETITORS

In Greece, the barriers of entry, in the form of capital required and issue of operational license, are low in some types of tourism businesses, such as travel agencies, small accommodation establishments, tourist shops and car rentals. This means that their number will continue to increase in the future. Likewise, although high capital investments are required for the construction of large hotels, incentives provided by the Greek government (e.g. by the last development law 2601/98) will increase the entry of new competitors. On the other hand, the high amounts required for the establishment of an airline and a shipping company means that the oligopolistic situation will continue in the future.

RIVALRY AMONG ESTABLISHED TOURISM FIRMS

The rivalry among Greek tourism businesses is keen. In fact, there is a large number of tourism enterprises and this number continues to increase. For example, the supply of hotel beds in the Greek hospitality industry increased from 57,022 in 1961 to 285,860 in 1981 and to 593,990 in 2000. The increasing number of tourism businesses leads to overcapacity at many Greek regions and places greater pressures on many types of Greek tourism businesses.

As far as air transport is concerned, although deregulation after the summer of 1991, has allowed to airlines, other than Olympic airways, to operate domestic flights the competition up to now is not severe. Finally, the passenger shipping is going to enter the era of free competition soon (Alexopoulos & Theotokas 2001).

BARGAINING POWER OF BUYERS / INTERMEDIARIES

In Greece, as in most Mediterranean countries, there are two major categories of clients, the independent tourists who make their own arrangements, and the inclusive tourists coming through tour operators (Andriotis 2003a). As independent tourists cannot guarantee increased sales to entrepreneurs, tour operators play an important role in the Greek tourism industry, mainly for packaging the various elements of the tourism product and distributing it to consumers (Andriotis 2003b; 2003c). As a result, intermediaries constitute a powerful group of buyers in the Greek travel and tourism industry to the extent that Howarth (1994) estimated that, in 1993, 65% of the hotel market in Greece was organized through tour operators. As Howarth (1994) reports:

It is an undisputable fact that the average Greek tourist entrepreneur is heavily dependent on the tourist package price which is strongly negotiated by the international Tour Operators. It is an "unhealthy" dependence as a result of the weak position of the Greek tourist product in the international market (p.3).

Because tour operators determine tourists' choice through advertising and promotion and due to the trend toward inclusive tour packages, organized exclusively in origin countries, the problem is getting severe (Andriotis 2000; 2002b). As Dighe (1997) remarks for a long time, major tour operators have treated Greece as a secondary cheap destination that sells always very well but late in the season. Since "the demand for tourism services is highly elastic with respect to price" (Truett & Truett 1987, p. 185), tour operators, in their attempt to maintain high profit margins, put fierce pressure on Greek entrepreneurs to keep prices down (Bird 1995).

POWER OF INFORMATION TECHNOLOGY

Although there is limited research for technology adaptation in the Greek travel and tourism industry, it is believed that because most of the Greek tourism enterprises are small in size¹, they are not able to benefit from the use of IT. This is evident by a study undertaken by Papanikos (2000) where it was found that only 17% of small and medium-sized hotel establishments use e-mail, compared to 64% of large establishments, and that only 18% of small and medium-sized hotel establishments accept reservations through Internet, compared to 61% of their larger counterparts. On the other hand, a study undertaken by Sakellaridis & Drosakis (2001) for the use of information and communication technologies by travel agencies in Crete and Rhodes found that although these companies use the Internet to promote their tourist products and services, the majority does not use the Internet for reservations because their customers arrive directly from tour operators.

In brief, since the majority of Greek tourism companies have not utilized ITs as a means to distribute directly their products/services and provide their customers with information, they will not be able to benefit from the use of ITs and eliminate or even remove intermediaries' intervention.

IMPACT OF GOVERNMENTAL REGULATION

In the evolution stage of Greek tourism, the government provided market-led incentives, such as grants interest free subsidies, untaxable allowances, and extra depreciation, directed at increasing bed spaces and the construction of facilities demanded by the tourist market (Andriotis 2001). In addition, during 60's, the first Xenia hotels were established by the Hellenic National Tourism Organisation all around Greece. Later, because of problems having resulted from uncontrolled tourism development, the Greek state through Law 797/86, attempted to control development and declared areas with high concentration of accommodation establishments as 'Areas of Controlled Tourism Development' where only high-class hotels could be constructed. Parts of these areas were declared as 'Saturated Tourist Areas' where no construction of accommodation establishments was allowed (Andriotis 2001).

Also, up to now the Hellenic National Tourism Organization exercises control over prices by specifying regulations for minimum prices to be charged for rooms or apartments, according to accommodation type (Andriotis 2003a). In the case of an establishment wanting to charge higher prices than the minimum, these prices should be declared to the Hellenic National Tourism Organization. However, frequently, hoteliers in their attempt to reduce lost revenue accruing from rooms remaining unsold, frequently reduce prices by offering discounts to tour operators (Buhalis 1995). This policy is in contravention of Law 642/1977, which imposes measures, such as fines, removal of operational license and reduction of category on law-breakers.

Up to 1991, legislation created legal barriers of entry to airlines, other than the national flag carrier Olympic airways, to operate domestic flights (Fragoudaki 2000). Likewise, recently barriers to sea transport have been erected. This liberalization of the Greek domestic air and sea market has had profound effects by ending monopoly in the air transport and oligopoly in the sea transport.

From all the above it is evident that Greek governments have played a significant role in the development of the tourism industry, with some times providing incentives to the private sector, and others adopting restrictions as a way to discourage further expansion.

CONCLUSION

This paper proposed a revised competitive forces model for application to the travel and tourism industry. The seven forces model proposed three main amendments at Porter's model. First, the model explicitly considered the role of intermediaries as a powerful group of buyers in the travel and tourism industry. Second, the model highlighted government regulation as a reason for changing market conditions for tourism businesses. Finally, the model declared IT as a vital means of tourism companies to improve communication with consumers and business partners.

The main implications of the proposed 'seven forces' approach is that tourism firms in order to achieve sustainable competitive advantage they have to consider the usefulness of forces, other than those proposed by Porter. This was evident in the case of Greece, where the seven forces model was tested and it was found that, although the limitations of the study, mainly the lack of data for the Greek travel and tourism industry, and, the variety of enterprises operating within the Greek travel and tourism industry that may differ in the way that competitive forces impact on each of them, the proposed amendments drive Greek travel and tourism industry competition and guide strategic management change.

Now, let's see some ways that Greece can use the new elements proposed by the revised model for the benefit of its travel and tourism industry.

To eliminate the intermediation of foreign tour operators and receive more benefits from tourism, there is a need to use the power of ITs. For example, to enable the transfer of information between bodies and individuals interested in the direct purchase of accommodation, transportation, excursions, tourist attractions and events on-line, the establishment of a central reservation system is necessary (Andriotis 2003a). This system could be available on computer terminals at the Hellenic National Tourism Organisation offices in Greece and abroad, as well as local offices.

"Without state intervention, tourism development will likely lack the cohesion and direction necessary to sustain itself over the long term" (Brohman 1996: 62). Given the importance of the tourism industry to the viability of Greek economy and the profitability of many tourism and non-tourism enterprises efforts should be made by the government to eliminate the problems faced by the tourism industry. Although, in the past the Greek government has been actively involved in the development of the tourism industry, technocrats have made many mistakes, mainly in forecasting demand. As a result there is an oversupply of rooms in some Greek regions (Andriotis 2001). Therefore, attempts should be taken to control future tourism expansion. Better governance and coherent tourism policy might be the key to address the competitive forces faced by the Greek travel and tourism industry.

To conclude, the forces proposed in the model may change over time, and, as a result, their relative importance may also change. For a tourism business, competitive advantage may result from being able to spot and exploit future forces quicker than its competitors. Therefore, for anyone wishing to use the proposed framework must first check and confirm its degree of accuracy in the time it is being used. Also, there is a need to explore the proposed forces in more detail and to confirm the relevance of the model to the travel and tourism industry of other destinations. Finally, further work is required to confirm whether the proposed model can be applied to other service-orientated industries.

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ENDNOTE

For example, Papanikos (2000) found that approximately 80% of Greek hotel establishments are small and Andriotis and Vaughan (2004) found that in Crete the average number of employees for travel agencies and car rentals was 3.5, ranging from 1 to 8, and to the tourist shops was two employees, ranging from 1 to 6.

Multimedia applications in Tourism: The case of travel plans

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ABSTRACT

Nowadays, there is an increase in the development of attraction and accommodation websites, with huge amounts of tourist material imbedded within. However, there is not a generic, dynamic and flexible architecture regarding the management of web attractions and accommodations by tourist agents. This occurs due to the lack of any type of standardization. We designed a novel management system of semantically enriched web travel plans in order these to become manageable, effective and adaptive to the users' needs. The new system is based on a peer-to-peer (P2P) network architecture. Furthermore, it includes a web log analysis module to evaluate how online travel plans are being consumed and to identify the individual differences among the users in terms of content usage.

Keywords: Travel plans, Web Semantics, P2P computing, Web log analysis.

1. INTRODUCTION

E-Tourism is a new research area created by the adoption of Information and Communication Technologies (ICT) in the Tourism Industry (Buhalis & Licata, 2002). ICT that may be adopted are: Electronic and Mobile Commerce, Web Services and Web Semantics, Expert Systems and Intelligent Agents, Data Mining and Data Warehousing, Wireless and Multimedia Communications, Virtual Reality (VR) and Augmented Reality (AR). The Web technology was very quickly adopted and used for travel information delivery and travel planning. The Web service enables the packaging of a wide range of diverse tourism products and services (Procaccino & Miller, 1999). Moreover, it provides the infrastructure for inexpensive delivery of multimedia information, promotion and distribution for tourism products and services (Hoffman, 1994). Using the Web, travelers can get information on timetables, routes, seat availabilities, accommodations, rental cars, and restaurants to help them plan their travels (Ndumu, Collis & Nwana, 1998). Remarkable progress has been made in the automation of travel planning with the help of the easily accessible information. There are semi-automated commercial service sites like travelocity.com, expedia.com and

orbitz.com (Paprzycki, Gilbert, & Gordon, 2002). There are also research prototypes of intelligent travel support systems based on software agent technology (Camacho, Borrajo, & Molina, 2001; Ndumu, Collis & Nwana, 1998). Ideal intelligent travel systems have software agents that find travel alternatives and choose the best satisfiable one with the minimum interference of traveler (Yim et al, 2004). In research and design of destination recommendation systems, user preferences are captured in the most accurate way possible in order to be able to provide useful recommendations (Nguyen, Cavada & Ricci, 2004). Nowadays, the Global Distribution Systems (GDS) dominantly provide the travel information services, which are not semantically enriched. The leading GDS are Sabre, Galileo, Amadeus and Worldspan. The GDS provide access to real time availability and price information for flights, hotels and car rental companies (French, 1998). GDS have legacy architectures with private networks, specialized hardware, limited speed and search capabilities. Furthermore, as GDS being legacy systems, it is very difficult to interoperate them with other systems and data sources (Dogac et al, 2004). For example, a travel agency may wish to integrate its Customer Relationship Management (CRM) system with the GDS to better serve its customers. To address these problems, the Travel Industry has formed the Open Travel Alliance (OTA) (<http://www.opentravel.org>), which produced the XML schema specifications for exchanging standard messages in the travel domain. These standard messages constitute the base for developing Web Services.

The Web Services technology can define a technique for describing web travel plans, methods for accessing them, and discovery methods that enable the identification of relevant travel plans' service providers. Web Services technology is a set of standards that allow web management applications of travel plans to talk to each other over the Internet. These standards are:

- a) XML (eXtensible Markup Language) for driving applications services.
- b) SOAP (Simple Object Access Protocol) for communication among Web Services.
- c) WSDL (Web Services Description Language) as the service description language.
- d) UDDI (Universal Description, Discovery and Integration) as the service discovery protocol.

To make web travel plans understandable and usable by other computers, we must introduce Semantics to web travel plans. The Semantic Web, as proposed by Berners, Hendler, and Lassila, (2001), is envisioned as an extension of the current Web where, in addition to being human-readable using WWW browsers, documents are annotated with meta-information. This meta-information defines what the information (document) is about in a way, which is machine processable. The Semantic Web sits on top of the Web as an integrating fabric. Such an environment forms a platform for information brokers, search engines, and "intelligent agents". The automated processing of web travel plans requires that explicit machine-processable semantics are associated with web travel plans as metadata, so that they can be interpreted and combined. So, we can exploit the web travel plan services to their full potential. Introducing Semantics to web travel plans services brings the following advantages:

- a) semantically enriched web travel plans services handle the interoperability at the technical

level; that is, they make travel plans applications talk to each other regardless of the hardware and software platform (All web travel plans services do not conform to the OTA standard); b) Semantics can be used for the discovery and composition of web travel plan services. In the travel domain, there have been efforts in defining the Semantics, such as the Harmonise and Satine projects (<http://www.srdc.metu.edu.tr/webpage/projects/satine/>). The Harmonize project (Missikoff et al., 2003) allows participating tourism organizations to keep their proprietary data format and use ontology mediation while exchanging information. The objective of the Satine project is to develop a secure semantic-based interoperability framework for exploiting web service platforms in conjunction with peer-to-peer (P2P) networks in tourism industry (Dogac et al, 2004). The EU-IST project SWAP (<http://swap.semanticweb.org>) demonstrated that the power of P2P computing and the Semantic Web could actually be combined to share and find “knowledge” easily with low administration efforts.

2. THE SYSTEM'S ENVIRONMENT

This paper proposes a web management system, in which the users are informed about the provided travel plans in order to make their actual reservations and travels. The system plays the role of an eTourism intermediary (Buhalis & Licata, 2002). It is an OTA, dynamic and interoperable system regarding the management of web travel plans. Web travel plans' management means creation, presentation, modification, deletion, as well as their indirect evaluation. The system facilitates the web travel plans service's discovery and interoperability, as it defines web service semantics for travel plans. It exploits the advantages of Web Semantics and P2P computing for travel plans service interoperation and discovery. These advantages in the travel domain have been analyzed by Maedche and Staab (2003). In our framework, P2P computing is the sharing of web travel plans and services by direct exchange between computers. The system combines the power of P2P computing and the Semantic Web to support a decentralized, ad-hoc environment (depicted in Fig. 1) of semantically enriched travel plans. In this environment, OTA members can maintain individual travel plans, while sharing travel plans in ways such that administration efforts are low, but travel plans finding is easy. The accommodation, attraction and transportation managers belong to the OTA Consortium and input their valuable information (e.g. hotel's availability, attraction's status and timetables) correspondingly. The OTA principal is responsible for the registration and administration of any member belonging to the OTA Consortium. A tour operator is authorized for the web travel plans' creation and management of his/her responsibility geographical region. Any authorized user (e.g. a potential tourist) can be informed about a provided travel plan and make a reservation for this. The user pays only if a reservation for a travel plan is made. The reservation module of the system updates the internal reservations modules of all service providers, which are involved in the particular booking travel plan, for the current travel resources' availabilities. In addition, the system supports users' patterns interpretation regarding their navigation habits within web travel plans.

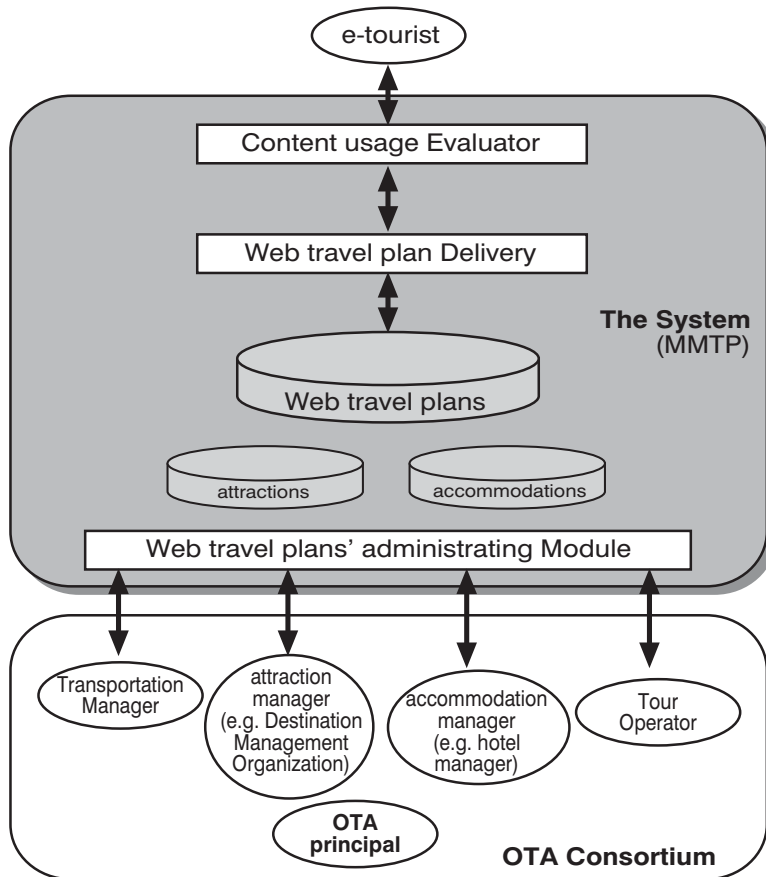


Figure 1. An overview of the system's environment

Next, we introduce three concepts: web travel plan, accommodation and attraction according to our Web Semantics approach.

3. WEB TRAVEL PLANS

The notion of web travel plan consists of a sequence of attractions and accommodations time intervals, which may be in turn:

$Travel_Plan_id = \{Tourist_Agency_id, T_interval1, T_interval_2, \dots, T_interval_n\}$

where, $Tourist_Agency_id$ is the owner of the web travel plan and $T_interval = \{attraction\}$ or $\{accommodation\}$.

A T_interval is stated as an attraction's or an accommodation's time interval, as the tourist could be in an attraction or in an accommodation state (Kanellopoulos & Panagopoulos, 2004). Web attractions and accommodations are equivalent to physical attractions and accommodations, and contain multimedia data (e.g. text, images, graphics, sound and video). Huizingh (2000) argues that multimedia offer increased modularity that is an important aspect in development and maintenance of any software components, and thus, of web travel plans. Modularity simply means that a user can select one or more media types to display travel plans' content. The contents of a web travel plan are attractions and accommodations.

3.1 Web Attractions and Accommodations

To exploit the web travel plans services to their full potential, we need ontologies to describe their semantics (Dogac et al, 2004). An ontology can represent a common, shareable view or understanding of the travel domain, which gathers and describes concepts and defines the relationship among them. Ontologies can be used for the communication between people and travel information systems. Any web attraction can be based on our proposed ontology "attraction", which is a set of semantic metadata: 1) the attraction's name, 2) the category in which the attraction belongs, 3) the attraction's exact location, 4) the proposed time for the completion of conducted tour in attraction, 5) the means of transportation, 6) the level of exposure to danger for this attraction, 7) the number of visitors that can visit the attraction, 8) the cost per visitor, 9) the presentation language of the conducted tour.

Attr_id={attr_Name, attr_Category, attr_Location, attr_Duration, attr_Transport_id, attr_Dangerous, attr_Visitors, attr_Cost, attr_Language}

where, attr_Category = {cave, church, monastery, castle, archaeological site, museum, village, gallery, library, bridge, theatre, etc.}

attr_Transport_id = {transportation_enterprise, transportation_category, timetable, fare_id}

Any web accommodation can be based on our proposed ontology "accommodation", which is defined as a set of metadata: 1) the accommodation's name, 2) the accommodation's category, 3) the accommodation's location, 4) the proposed time interval for the residence, 5) the means of transportation to this accommodation, 6) the level of exposure to danger for this accommodation, 7) the number of visitors that can stay at the accommodation, and 8) the cost per visitor in order to stay at the accommodation.

Accom_id={accom_Nane, accom_Category, accom_Location, accom_Duration, accom_Transport_id, accom_Dangerous, accom_Visitors, accom_Cost}

where, accom_Category = {hotel, motel, hostel, rooms to let, camping etc}

accom_Transport_id = {transportation_enterprise, transportation_category, timetable, fare_id}

3.2 Managing and Adapting Web Travel Plans

WTO (1998) argues “The key to success lies in the quick identification of consumer needs and in reaching potential clients with comprehensive personalized and up-to-date information”. The Web service enables travelers to access reliable and accurate information, as well as, to undertake reservations in a fraction of the time. Tourist’s satisfaction depends highly on the accuracy and comprehensiveness of specific information about the destinations’ accessibility, facilities, attractions and activities (Buhalis, 1994). The users, as potential tourists, tend to prefer integrated personalized services (Nysveen, Methlie & Pederson, 2003).

In our framework, we state the tourist’s preferences for a travel plan with the proposed ontology: *tourist’s_preferences*. This is defined as a set of metadata: 1) the identification of the travel plan of interest, 2) the level of accuracy concerning the info of the travel plan, 3) the level of comprehensiveness concerning the info of the travel plan, 4) the desired departure date and time, 5) the reservation cost for this travel plan, and 6) the meeting points for the departure.

tourist’s_preferences = {Travel_Plan_id, accuracy_level, comprehensiveness_level, departure_date&time, reservation_cost, point_locations_of_departures}

The proposed system using this ontology contributes to higher tourist’s satisfaction by adapting web travel plans to tourist’s preferences. The adaptation of travel plans is achieved by using the data-mining module of the system, which is described in Section 4.3. We defined the proposed ontologies using the RDFS language (<http://www.w3.org/TR/2000/rdf-schema>) that is used for expressing semantic metadata.

4. THE MANAGEMENT SYSTEM OF WEB TRAVEL PLANS (MMTP)

The proposed system is entitled: Management system of Multimedia Travel Plans (MMTP) and enables users to receive web travel plans, as well as attractions and accommodations, at any time at their own convenience. It supports multilingual databases to inform users who speak different languages. The system is based on a P2P web travel plans distribution architecture, which is a subset of a hybrid architecture presented in (Heffeda, Bhargava & Yau, 2004). The key idea of our P2P architecture is that the servers of web travel plans share some of their resources (attractions and accommodations) resulting to the overall system’s capacity increase. Therefore, a large number of users can be served at a low overall system cost. The main mechanism to discover web travel plans is service registries. The semantics of travel plans registries are used for semantic routing in our P2P architecture connecting the travel plans registries. The automation of the web travel plans discovery has been extended to include the discovery of web travel plans registries automatically. This is achieved by exposing the semantics of the travel plans registries and connect these registries through the P2P network. By saying semantics of travel plans registries, we mean the semantics of travel plans stored in these registries.

The proposed system is depicted in Fig. 2 and includes: 1) synchronous and asynchronous conferencing subsystems, 2) the web travel plans management subsystem, 3) the web travel plans delivery subsystem, 4) the payment transaction subsystem, 5) the data mining module, and 6) the optimal scheduling in traveling module, which forms a travel plan according to the availability of different transportation means.

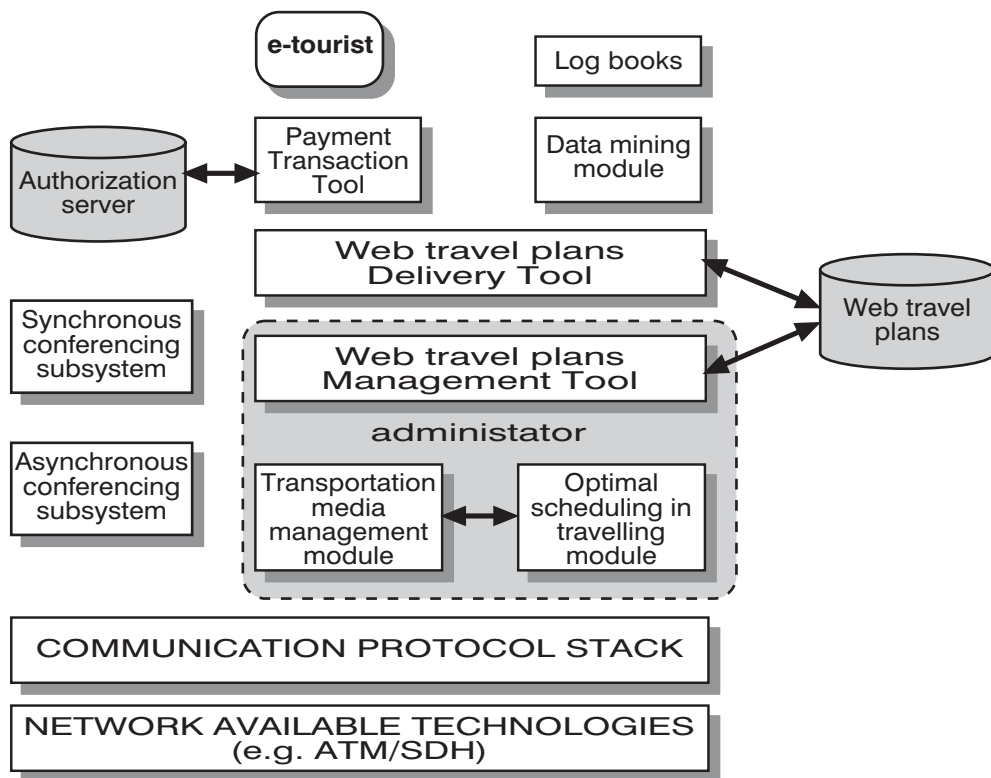


Figure 2. The MMTP system

4.1 Adminstrating Web Travel Plans

Discrete services are provided to the system administrator: 1) creation of a web travel plan, which is achieved by creating its attractions and accommodations based on attraction and accommodation prototypes, 2) modification of the content concerning an attraction or an accommodation, 3) classification of web attractions and accommodations according to certain criteria (category and/or characteristics) in order to facilitate information retrieval, and 4) deletion, modification, presentation, listening and printing the whole content (or a part) of a web travel plan.

4.2 Payment and Intellectual Property

Any authorized user can be connected to the system and be informed about a provided travel plan. The system includes a reservation module that maintains the availabilities for all travel's resources. The user pays only if a reservation for a travel plan is made. A special payment service that relies on an authorization service (Kerberos) and supports the credit-debit model is provided to the users. According to this model, users will maintain small accounts on a payment server and will authorize charges against those accounts. The system's providers are concerned that once they have made web travel plans available, copies will propagate and their contents will be deteriorated. Some researchers have proposed elaborate technical mechanisms to prevent this. Much of the technology needed to protect the network infrastructure of the proposed system already exists. Cryptographic techniques can be applied in support of authentication, authorization, integrity, confidentiality, assurance and payment (Neuman, 1995).

4.3 Usage Rate of Web Travel Plans and Marketing Policy

Olmeda & Sheldon (2001) analyzed the potential uses of data mining techniques in Tourism Internet Marketing and electronic CRM. Web usage mining refers to non-trivial extraction of potentially useful user patterns and trends from large web access logs. The analysis of user's patterns from navigation history can shed light on navigation behaviour and the efficiency of the models used in the on-line Tourism Marketing process.

In our system, the OTA members manage their web travel plans via the system. OTA members are responsible for the design of a marketing policy for their offered travel plans. During the user's navigation, the usage rates for attractions and accommodations of a web travel plan are indirectly registered. The usage rates of web travel plans are achieved by analysing the computer log file, which is created when users access web travel plans. In the system, every single request that a web server receives is recorded in an access log mainly registering the origin of the request, a time stamp and the resource requested, whether the request is for a web page containing an attraction or an accommodation. The usage rate of a web travel plan (and thus its evaluation) by analysis of computer logs has a methodological advantage: the information regarding user's activities is accumulated automatically and is stored in digital format for future processing and analysis.

The data-mining module of the system performs three consecutive procedures:

1) Data gathering and pre-processing for filtering and formatting the log entries. In the pre-processing phase, the system administrator picks filters to select the desired user or users' group, the desired time, and/or the relevant subset of web pages in order to zero-in on the travel plans, the attractions and the accommodations to evaluate. The system administrator can define the interpretation of a session that is an important concept in the web log data transformation. A *session* can be defined as the sequence of clicks of one user, which happens each time from "log in" to "log out" to a web travel plan. Later on, data mining algorithms

can use these sessions as the basic units for searching users' patterns.

2) *Pattern discovery* that consists of the use of a variety of algorithms such as *association rule mining, sequential pattern analysis, clustering and classification* of the transformed data in order to discover relevant and potentially useful users' patterns.

3) *Pattern analysis* during which the administrator retrieves and interprets the patterns discovered.

To enhance the knowledge about web travel plans usage patterns, three research questions must be addressed:

RQ1: *To what extent are web travel plans presented in MMTP's websites?*

The data regarding this extent will enable the tour operators to understand how to utilize their web travel plans. The system administrator provokes the tour operators to improve their travel plans according to their accessibility by users and their brand name.

RQ2: *What is the usage rate of specific content items in an MMTP website?*

Content item is a general name for all types of information uploaded into an MMTP website. If the usage rate of a content item (e.g. the *accom_Cost*) is very high, its role must be enhanced by designing it more carefully and providing more information about this item. We can determine if there is a threshold for the numbers of items viewed by users. Users may concentrate on a very small number of content items, or, on the contrary, their content consumption may be distributed equally over all items presented in the system.

RQ3: *What are the individual differences among users regarding content consumption?*

Understanding the individual differences between users will shed light on individual variance in the use of travel plans. For example, the system administrator discovers that a certain users group is interested for a particular category of hotels, and informs the corresponding OTA hotel managers in order to build an appropriate Internet Tourism Marketing Policy.

A future study should be conducted on a pilot website of the system to determine an Internet tourism marketing policy, which will be based on the usage rate of each travel plan and will be related to the individual differences among users regarding travel plans consumption. As the main dependent variable, we will use the "content item view," $C_{ij} = \{0,1\}$, which indicates whether user i ($i=1...n$ users) clicked on a link of a content item j ($j=1..m$ items) and accessed it. To avoid artificial inflation of viewing, only the first time a content item was accessed by a user will be considered. This criterion will present a "minimal picture" of content item consumption in every travel plan. Summing C_{ij} over all the n users represent the extent the j th content item was viewed, and summing C_{ij} over the m content items of a travel plan represent the amount of content items viewed by the i th user. For each travel plan, the

number of content items will be counted and the Cij matrix will be prepared separately and will serve as a basis for further quantitative statistical analysis.

5. CONCLUSION

The new management system of semantically enriched web travel plans is based on a P2P network architecture, in which travel plans' web servers (peers) share some of their resources. The system will bring important benefits to the travel industry: a) Due to Web Semantics, travel plans' services will provide Interoperability both with internal and external applications. b) The tour operators will combine the attractions and accommodations information, as well as transportation data, in order to create a large number of travel plans that are referred to different geographical regions. c) Travel plans' development time will be reduced by wrapping already existing applications as Web Services. e) As users will make reservations for travel plans, the system will update the corresponding databases that exist in the members of the OTA consortium (the travel's suppliers) in order the latest to make new offers. f) Finally, the provided web travel plans can be evaluated and be enhanced using data mining techniques, which entail the better integration of evaluating web travel plans, enhanced evaluation reliability and validity, and the saving of tour operators' time.

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E-marketing and E-commerce in the Tourism Industry: A Framework to Develop and Implement Business Initiatives

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ABSTRACT:

Information and communication technology (ICT) developments are permeating every aspect of tourism marketing. This paper proposes a methodological framework, which will enable tourism businesses to develop and implement their electronic marketing and commerce activities.

The paper initially reviews the e-business models literature. In the second section ICT implications in marketing and tourism are discussed. Then it presents the e-tourism business models and subsequently proposes a framework contributing to the planning and implementation of e-commerce initiatives. This methodological framework might also be used to analyse electronic applications in tourism.

It is suggested that a comprehensive strategic approach could allow travel and tourism businesses to overcome the challenges and exploit the opportunities presented by ICT.

Key words: E-marketing, E-commerce, Business models, Tourism and Travel industry, Methodological framework.

INTRODUCTION

The rapid advancement of information technology, notably the Internet and the World Wide Web, has created challenges and opportunities for the tourism industry. ICT has considerably changed the role of each player in the value-creation process of the industry. Evidence indicates that effective use of information technology is crucial for tourism businesses' competitiveness and prosperity, as it influences their ability to differentiate their offerings as well as their production and delivery costs.

Barnett & Standing (2001) argue that a rapidly changing business environment, largely brought about by the Internet, requires companies to quickly implement new business methods, develop new networks and alliances, and be creative in their marketing. ICT stimulates radical changes in the operation, distribution and structure of the tourism industry (Buhalis, 2000). Structural changes in the tourism industry involve the necessity to elaborate an appropriate response to communication and transaction needs within a given nexus of market forces and opportunities. Therefore, there is an imperative need for tourism businesses to actively select between business models or frameworks that can best support an effective online strategy.

From a marketing perspective, the Web gives rise to a new and very effective tool and changes the way marketers define marketing mix variables (Kotler, 2003; Siegel, 2003). A plethora of tourism products and services are easily available over the Web. However, tourism is a highly competitive industry and consumers have many choices as to how and where they allocate time and money to their preferences.

This paper initially reviews the e-business models literature. In the second section ICT influences in marketing and tourism are discussed. Then it presents the e-tourism business models and subsequently suggests a framework, which will enable tourism businesses to plan and implement effective electronic marketing and commerce activities.

ELECTRONIC BUSINESS MODELS

Internet commerce has changed traditional business models and has given rise to new kinds of business models. However, there is no commonly acceptable definition of the business model's concept. Business models have been defined and categorized in many different ways. The probably best known definition and classification of electronic models is the one of Timmers (1998). According to him, a business model is an architecture for the product, service and information flows, a description of the various business actors and of their roles, as well as a description of the potential benefits of these actors and finally a description of the sources of revenue. In addition, he acknowledges the necessity of providing a marketing strategy, in order to accomplish a business mission. Timmers classifies the eleven generic e-business models he outlines, according to their degree of innovation and their functional integration.

For Rappa (2001) a business model spells out how a company makes money by specifying where it is positioned in the value chain. His taxonomy consists of nine generic e-business models, which classify companies among the nature of their value proposition or their mode of generating revenues. A very interesting framework is described by Rayport & Jaworski (2001). They divide an e-business model into four main pillars, which are the value cluster, the marketplace offering, the resource system and the financial model.

Osterwalder & Pigneur (2002) approached a business model as the conceptual and architectural implementation of a business strategy and as the foundation for the implementation of

business processes. Three elements make up a business model: Revenue and product aspects; business actor and network aspects; and marketing specific aspects.

Obviously, the e-business models are implemented in a variety of ways and continue to evolve. Moreover, a company may combine different models as part of its overall Internet business strategy.

It would seem that a framework is more useful than a definition in contributing to the analysis of a business model's structure and in determining the critical success factors in e-commerce. Osterwalder & Pigneur (2002) formulated and proposed an e-business model ontology (e.g. rigorous framework) that highlights the relevant e-business issues and elements firms have to consider in order to operate successfully. This framework is founded on four main pillars, which are product innovation, customer relationship, infrastructure management and financial aspects, as presented briefly in Table 1. According to these authors, a business model is nothing else than the value a company offers to one or several segments of customers and the firm's architecture and network of partners for creating, marketing and delivering this value and relationship capital, in order to generate sustainable revenue streams.

Table 1. The pillars of an e-business model

Pillars	Content & Components
1. Product Innovation	The products and services a firm offers, representing a substantial value to the customer and for which he is willing to pay. The main elements are the value proposition a firm wants to offer to specific target customer segments and the capabilities that a firm has to obtain in order to deliver this value.
2. Infrastructure Management	This element describes the value system configuration that is necessary to deliver the value proposition. This comprises the activities to create and deliver value, the relationship between them, the in-house resources and the firm's partner network.
3. Customer Relationship	Through the use of ICT firms can redefine the notion of customer relationship. The relationship capital the firm creates and maintains with the customer, in order to satisfy him and generate sustainable revenue.
4. Financial Aspect	It is transversal because all other pillars influence it. This element is composed of the revenue model and its cost structure. The revenue model determines the firm's profit model and therefore its ability to survive in competition.

Source: Adapted from Osterwalder & Pigneur, 2002

It is obvious that the four pillars are interrelated and mutually supported. As for the business strategy, it is worth stressing that e-commerce initiative is not an activity that might or should be developed and implemented independently and separately. It has been suggested (Porter, 2001; Strauss & Frost, 2002) that it is necessary to have a strategic approach to e-commerce as a medium to accomplish the business aims. Therefore, marketing in the electronic era requires innovative strategies.

E-MARKETING AND E-COMMERCE IN TOURISM

Developments in ICT influence all marketing functions and the electronic marketplace brings new ways of marketing. It is obvious that ICT slashes marketing cost, removes intermediaries, and redefines marketing relationships (Rayport & Jaworski, 2001). The potential benefits resulting from e-commerce can be grouped into two categories:

- Improved effectiveness of current activities
- Broaden opportunities and new activities.

E-commerce has been defined as being "every kind of commercial contact or transaction between two or more parties, being done with electronic means and network, and having as direct or indirect aim to sell products and services" (Demetriades & Baltas, 2003: 40). It seems that this definition encompasses all marketing activities.

Rayport & Jaworski (2001) suggest that in order to compete in the electronic era, businesses must be prepared to use technology-mediated channels, create internal and external value, formulate technology convergent strategies, and organise resources around knowledge and relationships. On the marketing side, communication and customisation are among the new demands of the knowledge economy, whereby mass markets are a phenomenon of the past and interactive markets are the future (Wind & Mahajan, 2001).

ICT INFLUENCES ON MARKETING MIX

Evidence shows that ICT influences nearly every aspect of services marketing and the main stages in the marketing mix (Middleton, 2001). Kotler has restated the "Ps" (Product, Price, Promotion and Place) as "Cs" to reflect the consumer orientation that is central to modern services marketing thinking in an era of growing competition (Kotler & Armstrong, 1999). Product means Customer value; Price means Cost to the consumer; Promotion means Communication; and Place means Distribution, access or Convenience.

Moreover, the original four variables have been expanded to encompass People, Process (of service delivery) and Physical Evidence or design. These new marketing orientations are particularly relevant in the tourism field (Law, 2002a).

ICT has various influences in the fields of tourism and marketing. The Internet constitutes a medium of interactive communication and offers multiple uses for marketing purposes.

Technological developments enable customers and businesses alike to change the way that they conduct exchange transactions, which are the core of all marketing (Hanson, 2000; Middleton, 2001).

The main implications of ICT on the principal processes in marketing include:

- Market research and marketing information systems.
- Customer Relationship Marketing (CRM): The Internet has a catalyst role in CRM applications. The e-CRM tools contribute to the implementation of various marketing activities (Demetriades & Baltas, 2003; Vlachopoulou, 2003).
- Strategic Planning and Networking: Virtual marketing companies provide distribution and marketing services. They facilitate and provide a platform for the exchange of information and for e-commerce transactions for a wide range of products. The Internet also allows the creation of virtual enterprises in which ICT provides the linkages – especially networks for micro-businesses.
- Advertising and Public Relations: The Internet provides a completely new medium to communicate to targeted customer groups.
- Information materials: The commercial developments of Web sites made the Internet an excellent and relatively low-cost medium for creating customer awareness using multimedia methods.
- Sales Promotion and Pricing: The Internet is an ideal medium for communicating prices, special offers and late availability of product. Through connectivity between databases and yield management programmes, sales promotions can now be customized to individuals.
- Distribution and access: ICT has come to dominate the industry's way of thinking regarding the role and costs of distributing travel products. As a new channel for direct marketing communications, the Internet is also reinventing distribution. Distribution channels are the new forums for product innovation and development; they establish the parameters for pricing against competitors and are becoming the most important tool for sales promotion and merchandising.
- Consumer behaviour: The Internet - as a communication and promotional tool - is important, not only because customers buy products and services via electronic channels, but also due to its extensive use as an information medium (Turban *et al.*, 2000).

Tourism is an important user of ICT and the industry is singularly well placed to benefit because of its special characteristics. Table 2 shows the main influences of the Internet in the tourism market.

Table 2. Consumption behaviour and Internet's influences in the tourism industry

Information search	Evaluation of alternative options	Purchase / transaction	Comments
<ul style="list-style-type: none"> - High information asymmetry - Mainly operational value - Satisfactory value <p>Already in high degree on-line</p>	<ul style="list-style-type: none"> - Personal preference - High informative content - Low direct opportunity <p>Already in high degree on-line</p>	<ul style="list-style-type: none"> - No particular contract requested - Simple payment - Simple delivery - High informative content - Purchase mainly for the result <p>Already in high degree on-line</p>	<ul style="list-style-type: none"> - Frequent search is translated into frequent purchases - Low potential for consultative intermediary (preference market) - No prior assessment of the quality <p>Fast development in the Internet</p>

Source: Adapted from Zeng & Reinartz, 2003, pp.125-130.

In the first decade of the twenty-first century, travel and tourism is one of the world's largest and most refined information based industries (Middleton, 2001: 218-219). Access to the Internet as a marketing tool provides a completely new means of bringing the two dimensions together by integrating promotion and distribution. The power of Web sites is that they can simultaneously advertise, inform, display, promote special offers, make a sale and provide instant booking and confirmation in customers' homes or offices.

E-TOURISM BUSINESS MODELS

Because tourism is an information-based industry it is one of the natural leading industries on the Internet (Anchi *et al.*, 2003). It is anticipated that most, if not all, sectors in the travel and tourism industry throughout the world will have sites on the Internet; showing the suitable marriage of two of the world's fastest growing industries: information technology and tourism. That is why e-travel is the leading and fastest growing category of e-commerce (Law & Leung, 2002; Demetriades & Baltas, 2003). In order to exploit these opportunities in the market environment, tourism businesses have developed and implemented several business models. Table 3 shows the most frequently used models in the tourism industry.

Table 3. Business models used in the tourism and travel industry

Type of Model	Description and Forms
Brokerage	<p>Brokers are market makers; they bring buyers and sellers together and facilitate transactions (Law & Huang, 2003). Brokerage models include the following forms:</p> <p>Marketplace Exchange: offers a full range of services covering the transaction process, from market assessment to negotiation and fulfillment (example: Orbitz) (Law, 2002b).</p> <p>Demand Collection System: it is the "name-your-price" model pioneered by Priceline.com. Prospective buyer makes a final (binding) bid for a specified good or service, and the broker arranges fulfillment.</p> <p>Auction Broker: conducts auctions for sellers. Broker charges the seller a listing fee and commission scaled with the value of the transaction (examples: eBay and Skyauction.com)</p>
Advertising Model	<p>The web-advertising model is a Portal; usually a search engine that may include varied content or services. A high volume of user traffic makes advertising profitable and permits further diversification of site services. A personalized portal allows customization of the interface and content to the user. (examples: Yahoo.com; In.gr)</p>
Infomediary Model	<p>Firms function as infomediaries (information intermediaries) assisting buyers and/or sellers understand a given market.</p> <p>Travel infomediaries are globally branded 'virtual businesses' on the Internet that collect and sell information about a specific sector of a market and create a convenient platform (Cyber marketplace) on which buyers and sellers can gain information and do business (examples: Expedia; Travelocity; BargainHolidays and Travelselect).</p>
E-tailing	<p>Business operating exclusively in electronic retailing. This model might take three forms (Turban <i>et al.</i>, 2000; Kleindl, 2001):</p> <ul style="list-style-type: none"> • E-store: a single tourism shop • E-mail: consisting of many electronic stores • E-broker: simply provides aid to customers searching for products and business. It gains a commission from the businesses (example: Travelforall.gr]

R. Law (2001) provides valuable insights into the Priceline.com model. It offers products for sale in two categories: a travel service that offers airline tickets, hotel rooms, rental cars, packaged vacations and cruises; and a personal finance service that offers home mortgages,

refinancing and home equity loans through an independent licensee. Priceline.com has pioneered a unique new type of e-commerce known as a "demand collection system" that enables consumers to use the Internet to save money on a wide range of products and services while enabling sellers to generate incremental revenue. Priceline.com is the world's first buying service through which consumers name the price they are willing to pay. Priceline.com licenses its business model to independent licensees.

Orbitz.com has implemented the Marketplace Exchange model. It is a leading online travel company that enables travellers to search for and purchase a broad array of travel products, including airline tickets, accommodation, rental cars, cruises and vacation packages.

A FRAMEWORK TO DEVELOP AND IMPLEMENT E-TOURISM BUSINESS INITIATIVES

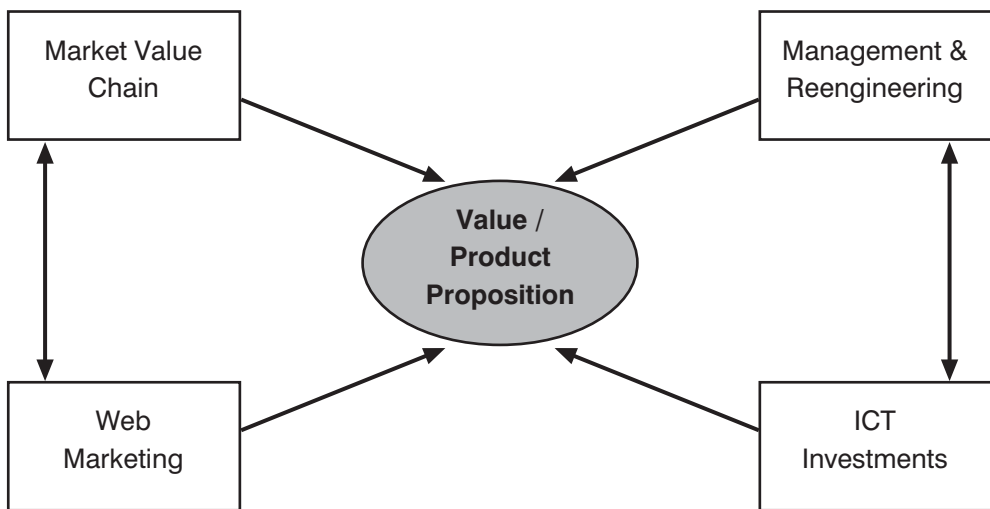
This section examines the factors that are critical to the success of an e-tourism business initiative and subsequently proposes a framework to plan and implement related activities. Researchers have attempted to approach and analyse the critical success factors in electronic tourism business initiatives (Bindiganavale *et al.*, 2002; Demetriades & Baltas, 2003). Evidence indicates that these factors include Value/ Product; Marketing Uses; Supporting Systems; Service Provision; ICT Infrastructure. Apparently, the most important factor for a successful Web site is its ability to focus on customer needs. The key is how to satisfy travelers' individual needs precisely and conveniently. (Anchi *et al.*, 2003; Sigala, 2004). Additionally, the Web presence must be used efficiently; that is to say for marketing purposes. Web sites have to be dynamic interactive relationship marketing tools rather than electronic brochures (Morrison *et al.*, 1999). Law & Leung (2002) have proposed an e-travel business framework to assess airfare reservation services in travel Web sites. This framework consists of information quality, system use, system quality, service quality, and customer loyalty. Rodriguez (2003) suggested a methodology for designing and deploying electronic enterprises-a step beyond intuitive or rule-based approaches and provided a framework for guiding the e-business development process.

Demetriades & Baltas (2003: 212-213) have summarized the various elements and have suggested five constituting dimensions of an e-business model / framework. These dimensions are:

- Value Proposition to customers and other business actors (products, services). This is the main corporate marketing decision.
- Revenue Model: Choose the potential sources of revenues (sales, advertising, subscription, and affiliation).
- Organisation Structure and Cost Structure: operational structure, business processes, and management information system.
- Positioning to the Market Value Chain: strategic positioning and business relationships.
- Networks: alliances and partnerships.

It is clear that every company might determine its own business model, a mix of the above five dimensions. Hence, adapting Osterwalder & Pigneur (2002) ontology and taking into account the factors proposed by the related research, we suggest the e-tourism business framework which consists of five elements shown in Figure 1. Its right side could be considered as managerial and the left one as being marketing-oriented. Therefore, the proposed framework takes into consideration the two important pillars of tourism business operations, namely management and marketing; the emphasis being placed on the latter.

Figure 1. Framework to develop and implement e-commerce initiatives in the tourism industry



It should be noted that these factors – briefly described below - are interdependent and interlinked.

1. **Value / Product Proposition:** The customer's purchase should be approached as a search of "solution" for its needs, a solution that gives a benefit and involves a cost (Kotler, 2003). Select the appropriate marketing strategy.
2. **Market Value Chain:** Build up the appropriate network and alliances in regional / destination level. Recognize that business processes will change; for example, through new linkages and partnerships with portals and other e-commerce operators.
3. **Web Marketing:** Aiming at customer attractiveness and interactive marketing relationship. Create a meta-market offering the whole package of travel services in order to support the customer experience's customization.
4. **Management & Reengineering:** Resources and assets management. This element encompasses the financial aspects (costs and revenues). Reengineering services processes producing and delivering the service offered (Tinnilä, 2002).

5. ICT investments: Necessary information technology investments; the electronic media and tools to be planned and implemented; and their adequate uses.

The above-proposed framework reflects a strategic approach (Christian, 2001; Kleindl, 2001) in order to integrate e-commerce initiative into business operations as a medium to serve the corporate strategy and aims.

CONCLUSIONS

Information technology leads to flexible and market-oriented business, and success depends on quick response to rapidly changing customer needs, using ICT in order to deliver the appropriate products to the targeted segments. The use of the Internet and the WWW enable tourism businesses to improve their flexibility, interactivity, efficiency and competitiveness.

The new economy is radically changing distribution patterns and traditional customer behaviour. A key issue for all tourism business is how to evolve their companies from an old economy to a new economy business. Undoubtedly, the Internet, both as a channel and technology, has created a disruptive change in the tourism and travel industry. It has been suggested (Soteriades, 2002; Siegel, 2003) that only a strategic marketing approach can allow the tourism industry to take advantage of ICT.

Tourism businesses have to consider and approach the Internet as a form of technology offering strong potential, a set of tools that can be used in almost every market and business. The crucial point is not whether a company should use it or not, but the way it should be exploited in order to create value (Porter, 2001). To take full advantage of the Internet; a company has to take into account the informative content of the product / service, the whole value proposition, contact and the interactive relationship that can be developed with its customers. In addition, it is important to point out that the "conventional" (off-line) and electronic (on-line) activities and applications must be complementarily planned and implemented.

We believe that the above-proposed framework contributes, on the one hand, to the development and implementation of effective and successful e-commerce initiatives; and on the other, constitutes a basis to evaluate the use of a commercial Web site as a marketing tool. We believe that it is worth stressing the following points:

- There is an imperative need for an integrated planning and implementation of e-commerce initiatives and Web presence.
- Beyond the strategy's formulation and organizational planning, the development of an Internet business presence involves some particular and specific actions in order to ensure its quality, thereby, contributing to the general marketing strategy's effectiveness.

- Evidence indicates that failing to introduce innovations, such as ICT, is due either to the lack of strategic planning or to the non-acceptance and implementation of the strategy in-house (Porter, 2001; Demetriades & Baltas, 2003). Therefore, the integration of e-commerce activities into business operations should be considered as a 'top-down process', which must be supported by general management.
- Finally, the e-commerce operation is not an aim *per se*, neither an activity that might be developed independently and implemented separately. It should be incorporated as a new media that serves current or future corporate general strategy and aims.

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Tourism in Humanistic Perspective – Scientific Conference

Wojciech J. Cynarski

Kazimierz Obodynski

On the occasion of 30-year anniversary of the Faculty of Tourism and Recreation of University School of Physical Education in Poznan the Institute of Cultural Bases of Tourism organized on 5-6 November 2004 the First All-Polish Scientific Conference under the motto: "Tourism in Humanistic Perspective". This conference took place in the "Inter" Hotel in Dymaczowo Nowe, a small place, situated in picturesque surroundings near Poznan.

The solemn commencement and plenary session, in which there participated, among others, the rector of Poznan University School of Physical Education, Prof. T. Rychlewski, were presided by Prof. Lucjan Turowski (Higher Pedagogical School ZNP, Warsaw). There began the main organizer of the event, Prof. Marek Kazimierzczak of University School of Physical Education who, in his introduction to the debates, indicated the relations between tourism and culture – material and spiritual culture. However, the first lecture on *Tourism in the anthropological perspective* was given by L. Turowski - at the same time a historian, pedagogue and theoretician of tourism. He equally paid attention to: Confucius's encouragement to travels and perceiving in them their cognitive function; Plato's andragogic thought and recommendations "read, travel, talk to wise people", A. Komenski's "education for travels and education by travels". The Greek idea of traveling was already connected with education. The phenomenon of transgression occurs when we are changed by the impressions gained during travel, under the influence of cultural impulses. In Turowski's opinion the history of travel requires still more precise elaboration.

The author of the second plenary lecture was K. Podemski Ph.D. (University of Adam Mickiewicz, Poznan) who spoke of semiotic theories of tourism. He referred to the science introduced by Ch.S. Peirce (semiotics, semiology) and his notional categories. In the category of 'icon' sign there are included photographs and maps, 'index' is information-guideposts, and 'symbol' is some semantic convention. He indicated the necessity of considering in the theory of tourism the 'humanistic coefficient' of F. Znaniecki and the occurring in practice process of sacralization – transformation of ordinary objects into tourist attractions. A tourist seeks typical objects and symbols of a given culture. A 'tourist look' can be romantic (alone, with contemplation of nature) or collective – in group participation, where company of other people is the attraction. In Podemski's opinion, the semiotic approach can constitute a plane of understanding of humanists - theoreticians of tourism. The lecturer also proposed creating a periodical which would deal with (humanistic) theory of tourism.

As the third there performed Prof. S. Bosiacki (University School of Physical Education, Poznan), an economist. In his lecture entitled *On humanistic conception of development of tourist economy in Poland* he stated that “the economic function of tourism is becoming a fetish”. Bosiacki also thinks that tourism is a multi-aspectual, interdisciplinary phenomenon.

The fourth of the lecturers – Prof. K. Lastowski (UAM Poznan) - introduced himself as an ecologist and presented *Perspectives of ecology as humanistic knowledge*. He formulated the following definition: “Tourism is the humanistic way to getting acquainted with the world of nature and culture, or civilization”. He spoke of degradation of biodiversity and similar problems of ecology. However, he did not refer to the output of social ecology of Park nor to ‘ecology of mind’ of Bateson.

The plenary session was ended by the performance of M. Kazimierczak entitled *Ethics of tourism in global perspective*. The author of the lecture presented the dilemma – is tourism a form of dialogue or of an exploitation? Only one fifth part of world population participates in tourist activity. What is ethics of tourism to be like? “Global Code of Ethics for Tourism” constitutes an attempt to formulate it.

The afternoon debates were divided into two thematic sections. One on “Anthropological, social and axiological dimension of tourism” was conducted by A. Wozniak Ph.D. and I. Kielbasiewicz-Drozdowska Ph.D. The other, devoted to historical-cultural and educational aspects of tourism was presided by Prof. J. Grell (AWF Poznan).

Since our lecture was qualified to the second section, we participated exactly in this debate. There were presented 9 lectures, among others a historian, philologist and ethnographer Prof. J.P. Majchrzak (State Higher Vocational School in Sulechów) presented the history of the Lubuskie region with the use of the biographical approach. D. Zywiecka M.A. (AWF Poznan), basing on history of art and her own experiences as a guide of tourist trips, presented the area of the borderland of Europe, Africa and Asia with their ancient 7 wonders of the world. J. Styperek Ph.D. (WSZ Konin) discussed educational functions of tourist routes. The lecture which we prepared, entitled *‘Tourist ways’ of the environment of martial arts in Europe – social-cultural draft* aroused the interest of, among others, Ms. Anna Wiczorkiewicz Ph.D. (Institute of Philosophy and Sociology of Polish Academy of Sciences), whose undergraduate is writing a thesis – on the ground of cultural ethnology and anthropology – just on tourism for the studies of Brazilian *capoeira*. Later, several persons asked a series of questions concerning the very Far-Eastern martial arts.

On the second day we chose the first section which was conducted by K. Podemski and A. Wiczorkiewicz. At the same time the debates of the second section were presided by M. Orlewicz-Musiał Ph.D. and M. Kitowska Ph.D.

The first lecturer of the first section was R. Forowski M.A., a young psychologist of University School of Physical Education in Poznan. He spoke of ‘naturism’ i.e. tourism of naturists, of very naturists and nudists declaring ecology, and of ‘pornographization of culture’.

Anna Wiczorkiewicz presented interesting theoretical elaboration on *Projects of tourist experiences in the contemporary culture*. On the one hand she analyzed the tourist performance and theatrical character of the world watched, on the other hand – ‘tasting the world’ in mass culture.

Great interest and also controversies were aroused by the lecture of W. Slosarz Ph.D., a psychologist of Wroclaw University, devoted to travels in search of attractive sex. In the lecturer’s opinion this proceeding concerns especially the representatives of free professions and businessmen, including, in increasing degree, women (Polish women) of middle age. While men choose Russia, Thailand or Cuba, women seek lovers most eagerly in Arab countries. The travelers do not feel guilty in this respect (!) Homo-sexual and pedophilic types of tourism are also blooming. Podemski added the example of “bush-therapy” applied in sanatoriums and defined the whole field as a sign of pathology – dehumanization. They are namely motives low not only in Maslow’s hierarchy of needs and behavior of “escape” from inconvenient ties of morality and social control. However the lecturer, as a sexologist, did not give – as he claimed – ethical opinions, but basing on Freud’s theories he explained to his patients and to the discussing persons (one of them left the room) the normality and understandability of sex tourists’ behavior.

The author of the eighth lecture in this session, W. Rozwadowski M.A. (Higher School of Hotel Trade, Gastronomy and Tourism, Warsaw) proposed creation of the base of information on conferences and publications in the field of tourism which will join researchers of economic sciences, sciences of physical culture and humanistic sciences.

Seeing the Model of the Old Poznan proposed for the afternoon, did not arouse the interest of participants because of the late hour, so, after dinner, the debates were officially ended and the conference was closed.

CONCLUSIONS

Such a conference was really needed. The composition of the Institute of Cultural Bases of Tourism of University School of Physical Education organizing the conference influenced the thematic profile. Namely, the organizers are the graduates of UAM - faculties: philosophy (3 persons), history of culture and art (2), sociology (1). It seems as if there lacked closer relation of theoretical reflection to the humanistic output of the researchers of physical culture, such as Z. Krawczyk, J. Kosiewicz, Z. Lyko, J. Lipiec or W. Liponski. This gap will be partially filled up – in the field of humanistic reflection on tourism – by the book, published by Podkarpackie Scientific Association of Physical Culture in Rzeszow, entitled *Tourism and Recreation in the Process of European Integration* (Cynarski and Obodynski, 2004).

In the meantime, as usually practiced at a good scientific conference, there was published the collective monograph (Kazimierczak 2004) containing 42 texts of authors from many different centers. An extremely valuable initiative of M. Kazimierczak is to be continued in a 2-year cycle and perhaps it will transform into the international conference.

3 persons from the Institute of Physical and Health Education of University of Rzeszow took part in the conference – Prof. K. Obodynski, W.J. Cynarski Ph.D. and Z. Barabasz M.A. Two days and two nights spent in Dymaczewo Nowe were undoubtedly the time spent strenuously, pleasantly and usefully at the same time. It was possible to exchange views, buy literature and make scientific contacts – contacts the more needed in the perspective of the conference on tourism planned for the next year which is to take place in Rzeszow.

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Manuscript Submission Procedure:

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Full papers should be between 2,500 and 4,000 words. Research notes or case studies should be up to 1,500 words. Commentaries should be up to 1,200 words. Book and conference reviews should be 1,000 words long.

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- All submissions (full papers, research notes, case studies, commentaries, and book or conference reviews) must have a title of no more than 14 words.
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- The use of footnotes within the text is discouraged – use endnotes instead. Endnotes should be kept to a minimum, be used to provide additional comments and discussion and should be numbered consecutively in the text and typed on a separate sheet of paper at the end of the article.
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- *For reports:* Edelstein, L. G. & Benini, C. (1994) *Meetings and Conventions*. Meetings market report (August), 60-82.