

## **PART V**

# **SUSTAINABILITY AND SOCIAL RESPONSIBILITY**

# THE EUROPEAN CHARTER FOR SUSTAINABLE TOURISM: A BENCHMARKING STUDY THROUGH THE EXPERIENCES OF THE SPANISH CHARTER AREAS, ORIENTED TO IDENTIFY CHALLENGES AND OPPORTUNITIES FOR MONFRAGÜE NATIONAL PARK

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## ABSTRACT

The aim of the presented study is to performance a benchmarking analysis of the experiences of the Spanish natural protected areas, which have attached the European Charter for Sustainable Tourism. Thus, this study helps directly in raising management standards to take full advantages of Monfragüe's Chart adoption. To achieve this objective, firstly, a literature revision to illustrate the state of the art on this topic was performed. After that, an exploratory qualitative research, consisting in interviews to Park and Business Managers from other Spanish Charter areas, was completed. Finally, a discussion about the key factors to achieve a successful implementation of the Charter and its subsequent successful management in Monfragüe Natural Park is presented. In brief, the study shows the findings of evaluation to feed back into and guide ongoing management so as to progressively improve management performance for the Charter candidate of Monfragüe Natural Park.

**Key Words:** benchmarking; management; tourism; sustainability; protected areas.

## INTRODUCTION: OPPORTUNITIES AND THREATS ARISING FROM TOURISM DEVELOPMENT IN PROTECTED AREAS

Tourism development may report substantial benefits for protected areas (Yague, 2002; Blaine and Golan 1993; Deroi 1991), although several negative effects, financial, economics, socio-cultural and environmental, can and do result from tourist visitation. However, many of these negative influences could be efficiently managed and alleviated (Notarstefano, 2007). In brief, based on the foregoing, ecotourism and sustainable tourism strategies must be designed to manage park visitation to maximize positive benefits and minimize negative environmental impacts prior their occurrence. This is best achieved through well-designed planning strategies. This paper is focused on strategic planning management for tourism development in protected areas. This turns to be a quite complex topic, thus a successful planning process should consider a wide range of aspects and how they will be addressed to achieve an effective touristic development model. One of the relevant aspects that should be well thought-out is the clarity in the plan production. Besides, it is essential to involucrate politicians, interest groups and local communities in the plan development to ensure its implementation as well as the representation of wide interests. Ultimately, the planning process should be used to reinforce relationships, to secure community commitment and to build support for funding and personnel (Eagles et al., 2002). Many of the guidelines for sustainable tourism planning described above inspired the European charter for sustainable tourism (ECST). At heart, the ECST is a partnership between a protected area and all those with a stake in how tourism in that park's region is run. It aimed to develop and manage tourism in protected areas in a sustainable way, taking account of the needs of the environment, local residents, local businesses and visitors. Nowadays, Spain is the European country which has more charter areas, 30 out of 77, placed most of them in the south of Spain. The western Spanish region of Extremadura has not any charter area in its territory until now, however, the Biosphere Reserve of Monfragüe<sup>1</sup> is currently going through the charter adhesion process. This fact motivated the study presented in this paper.

## OBJECTIVES

The study presented was aimed to perform a benchmarking analysis to learn from the experiences of the preceding Spanish Charter areas. In brief, evaluation of management outcomes in Spanish Charter areas will be incorporated into management plans for Monfragüe. Hence, the proposed study will be able to report relevant and useful information to smooth the process of Monfragüe adhesion<sup>2</sup>. In addition, a second goal will be

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<sup>1</sup>Designated by UNESCO in 2003.

performed: to help directly in raising management standards to take full advantages of Monfragüe's Chart adoption.

## **THE EUROPEAN CHARTER FOR SUSTAINABLE TOURISM**

The ECST is a good practices program aimed to set standards and provide guidelines, for park authorities, local business and tourism operators, to develop a sustainable tourism in natural protected areas. The ECST is not a quality or eco-label, as for instance Green Globe or Blue Flag are, although 'quality' is a guiding principle (Engels & Hesse, 2003). Nevertheless, the ECST is more than a verification program. The value of the Charter is the process-oriented methodology. Other experiences alike the ECST are PAN Parks, *Protecting Europe's Wilderness*, or NECSTour<sup>3</sup>, (Hamele, 2002; Buckley, 2002). The ECST is focused on initiating and assisting the process of sustainable tourism planning, able to lead to sustainable development step by step. The Charter supports this process by providing a "strategy development kit" which contains principles, a methodology and checklists for the protected areas to work with. The basic principles supported by the ECST are: Preserving natural resources; Managing a range of impacts; Contributing to conservation; Supporting the local economy; Involving the local community; Developing appropriate quality tourism; Welcoming new markets; Creating new forms of employment; Encouraging environmentally friendly behavior and providing a role model for other sectors (Sadorage, 1998). Therefore, the needs of the environment, the local population and the local tourism businesses, will be considered in the management of the protected areas. The strategy should be based on careful consultation, and approved and understood by local stakeholders. It should contain a definition of the area to be influenced by the strategy, as well as an assessment of the area's natural, historic and cultural heritage, tourism infrastructure, and economic and social circumstances; considering issues such as tourist carrying capacity, needs and realizing potential opportunities. Furthermore, an assessment of current visitors and potential future markets must be included. After that, a set of strategic objectives for the development and management of tourism must be specified. These objectives are required to face the conservation of the environment and heritage, the economic and social development, the preservation and improvement of the quality of life of local residents and the visitor management and enhancement of the quality of tourism offered. Subsequently, an action plan to meet these objectives will be developed, indicating the resources and partners available to implement the strategy and proposals for monitoring the results (EUROPARC Federation, 2011).

## **THE EUROPEAN CHARTER FOR SUSTAINABLE TOURISM IN SPAIN**

Rural tourism represents one of the touristic segments whose demand has been increased more over the past decades in Spain (Barke, 2004). The uplift in rural tourism has been reflected in the increased occupancy rates at rural accommodation over the last decade (INE, 2001-2010). In spite of this, previous studies across European countries have suggested that rural tourism is not a panacea for the economic problems of the rural population, although it certainly can contribute induce socioeconomic development in rural areas (Canoves, et al., 2004). The success of rural tourism highly depends upon improving management and marketing at the same time as establishing a balance between the development of economic activities and safeguarding the attractiveness of the rural environment. Calgary tourism competitiveness model set that destination management could be divided into two parts: managerial and marketing efforts (Mihalic, 2000). These two parts are considered by the ECST, suggesting a model to manage the destination competitiveness as well as its environmental image, which influences destination choices. Since the relevance of internationally recognized accreditation schemes by independent third organizations or bodies is proven, the ECST represents a good opportunity for protected areas to support their branding. This understanding led many Spanish protected areas to take the strategic decision of joining the ECST. Since the early beginnings of the ECST initiative, Spain had a relevant roll in the design and diffusion of the ECST. Therefore, two Spanish protected areas were designated as pilot Natural Parks, "La Garrotxa volcanic zone Natural Park" and "Sierras de Cazorla, Segura y las Villas Natural Park" included in the "Comité de Pilotage". Currently, Spain is the European country which has more Charter areas, 30 out of 77.

## **MONFRAGÜE AS A TOURIST DESTINATION AND AS A CHARTER CANDIDATE.**

The Monfragüe National Park in Extremadura was declared "Natural Park" in 1979 and "National Park" in 2007. As well, it was incorporated in the "Birds Directive" as a "Special protection area for the conservation of wild birds" in 1991 (Council Directive 79/409/EEC). In addition, it was classified as "Sites of Community Importance" in 2000 and designated as a "Special area of conservation" by the "Habitats Directive" (Council Directive 92/43/CEE). Concerning Monfragüe's adherence to the ECST, nowadays it is going through the adherence process. Across an interview in deep with the manager of ATUMON<sup>4</sup>, information about the followed adherence process and the foreseen actions were gathered. The most significant hits in this process are described

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<sup>3</sup>Network of European Regions for a Sustainable and Competitive Tourism.

<sup>4</sup>Tourism Association of Monfragüe.

in the table 1.

Table 1. Monfragüe's steps to become a charter area.

2009	October	The environmental authority decided to initiate the adhesion process.	
	November	The application form to become a charter candidate was sent to Europarc.	
	December	Monfragüe was registered as a charter candidate.	
2010	January to February	Open process for recruitment technical assistance.	
	March to November	Drafting of the candidature dossier.	Constitution of the work-group.
			Foundation of the sustainable tourism forum.
			Dossier development: Diagnosis, Strategy and Action Plan.
December	Dossier presentation and sent to Europarc for evaluation.		
2011	January to March	Reading and evaluation of the dossier.	
	April to May	Verification visit.	
	June	Accreditation notification.	
	July to August		
	September	Official deliver of the Accreditation Certificate.	
	October to December	Action Plan for the development of the ECST implementation.	
2012-2016			

## LITERATURE REVIEW- BACKGROUND

The touristic sector represents an important mainstay for Spanish economy; consequently, the sustainable management of tourism has been addressed as a strategic objective for Spain. This concern has been reflected across Spanish tourism legislations, which vary across the different Spanish regions due to the fact that each region is responsible for tourism legislation into its territory. Because of this, there is a lack of homogeneity on Spanish tourism legislation, which induces negative impacts on tourism in general, and on rural tourism specifically. That is, for instance, the absence of a common regulation for the different categories of rural farmhouses at a nationwide scale. Nonetheless, one common denominator among the different Spanish regions' legislations is the inclusion of the touristic sector into their "Sustainable Development Plans", SDP. These plans have been defined by different Spanish regions, to assist the economical progress of the local communities in rural areas, many of them placed in the influence zone of protected areas. Reviewing these SDP, it has been found that some of them establish the convenience of joining the ECST for the tourist development of the area referred to the plan (Muñoz, 2006), hence the Charter has proved to be a valuable tool for implementing sustainable tourism in protected areas (Engels & Hesse, 2003).

Apart of the mention of the advisable adhesion to the Charter, found in the Spanish SDP, some other documents dealing with experiences on Charter adhesion process along with its implementation were located. These are benchmarking studies developed by EUROPARC aimed to evaluate the charter areas experiences. The only Spanish Charter area referred in all of them is "La Garrotxa volcanic zone Natural Park", placed in Catalonia, North of Spain. This success is explained as a result of the high degree of involvement of key partners. Other relevant factors are its staff and the funding by European Programs, such as ADAPT, LEADER II, LEADER PLUS, Footpath Network Project, etc. (Prats, 2005). A previous study developed for the Scottish Natural Heritage analyzed the cases of several natural areas across Europe, and "La Garrotxa" was one of them (Stevens, et al., 2002). This report underlined from La Garrotxa's experience the relevance of taking advantages from the synergies resulting by working together, improving the obtained results. On the contrary, working together implies the need to be aware of possible non sharing of common aims and long term aims, which complicates the management of the protected area. Another research about sustainable tourism management in protected areas studied the case of "La Garrotxa" once more. This research evaluated the Action Program for Tourism Development (APTD) in "La Garrotxa" since it became a Charter area, in 2001, until 2005. The conclusion, against the previous results presented, was that the implementation of the program was not the expected due to several reasons. Only 5 up to 28 actions were developed as they were planned: external communication; local community, school students and external population awareness; and definition of the action plan for the forest management. The rest of the planned actions were modified in order to be able to fulfill them, or were developed with delays, or were definitely abandoned because they were non-mature ideas. The evaluation of this APTD was subjective, thus any objective indicators were defined in the beginning, and there were no monitoring of the APTD progress. Because of this, it was very difficult to get a feedback *a posteriori* (Muñoz, 2006).

Other studies were centered on analyzing the management of Andalusian natural parks, with independence of being a charter area or not. These studies were developed in Andalusia, aimed to identify the main barriers that the managers must handle to achieve a sustainable management of their areas. These studies were mainly qualitative researches based on Delphi Method enforcements. One of them, consisted on interviewing seventeen experts specialized in touristic planning and management in natural areas, identifying the following weak points in the management of Andalusian Natural Parks: infrastructure deficits, which limit their accessibility; technological tools deficits, especially in those which facilitate and optimize the tourism management; legal problems due to the lack of coordination between environmental and touristic policies; tourists hardly ever motivated and educated, exhibiting a feeble environmental awareness and commitment; difficulties to maintain the natural resources, thus the number of visitors frequently exceed the touristic carrying capacity. Also, the author drew attention to the negative impacts threatening the Natural Parks, caused by the lack of foresight. Consequently, the author remarked the need of measuring these impacts. Lastly, other handicaps for sustainable tourism development are the excessive bureaucracy, which slows down all the undertaken initiatives, and the involved agents' low qualification, particularly on languages, interpretative techniques and environmental management. For all these reasons, the adhesion to the ECST was proposed as a useful managerial tool to help the protected areas to overpass the described handicaps (Pulido, 2007a). In other related study, the same author surveyed 24 up to 25 Andalusian Natural Parks managers, concluding that the touristic supply was scattered and unstructured, suffering from the emergent destinations' usual problems (Pulido, 2007b). Accordingly, the author proposed firstly, to define and implement an active touristic policy, adapted to the protected areas particular conditions, along with the necessary financial support to meet the fixed objectives. Thus the interviewed experts expressed that the visitors' willingness to pay is null or very low. Secondly, the implementation of a touristic information system to gather figures and to trace the economical, environmental and social impacts, caused by the touristic activity, was also suggested as an essential instrument of any efficient touristic policy.

## METHODOLOGY

In order to achieve the fixed objectives, a qualitative research was designed, addressing the analysis of the two essential pillars for the tourism development at Monfragüe Natural Park: on one hand, the Spanish Charter Area Managers (CAMs), and on the other hand, the Charter Partner Business Managers (CPBMs), given that these two collectives would be able to report interesting guidelines for the implementation of the ECST by Monfragüe, completing the proposed benchmarking study. Information about the main difficulties, as well as the main compensations, derivated from the Charter adhesion was requested from the CAMs. While, regarding to the CPBMs, the objective was to gather information about their overall experiences, as well as the implications of the Charter partnership over their service delivered systems. One specific goal was to evaluate the managers' perceived costs relating to the Charter commitments, plus their perception about how the Charter supported them to improve their business success. To fulfill these goals, two different questionnaires were designed; the one for the CAMs integrated 19 items, while the other one had 32. The survey was carried out during the last semester of 2010. The questionnaire for CAMs was sent to the 30 Spanish CAMs, whereas the other one was sent to 156 Charter partner business<sup>5</sup> documented through the official information exhibited on EUROPARC website. The questionnaires were online administered, getting a response rate above the 33%, which means that 10 up to 30 CAMs cooperated, whereas 53 CPBMs did it. In sum, 15 Charter areas collaborated with the present research: "Los Alcornocales", "Sierras de Aracena y Picos de Aroche", "Sierra de las Nieves", "Sierra-María Los Vélez", "Breñas y Marismas de Barbate", "Sierra de Cardena y Montoro", "Sierras Subbéticas", "Las Batuecas-Sierra de Francia", "Sierra de Andújar", "Zona Volcánica la Garrotxa", "Grazalema", "Sierras de Cazorla, Segura y las Villas", "Sierra Nevada", "Doñana" and "Delta de L'Ebre".

## EMPIRICAL FINDINGS OF RESEARCH

All of the interviewed Charter areas, except one, got the adhesion at their first attempt without being required to introduce any modifications in their Diagnosis, Strategies or Action Plans. Only in one case, the verifier suggested to modify the defined Action Plan, in order to detail deeper their guiding principles and their planned actions. So, in general, any of the Charter Areas did not find special difficulties through the accreditation process. As far as a successful sustainable tourism development extremely depends on the enterprises placed at the protected area and on their determination to promote respectful practices, the point of view of the CAMs about the Charter enterprises' behavior was asked. Regarding to the Charter partner businesses, the CAMs considered that a lot of time and efforts were required to obtain their commitment, and, in the beginning, the bigger barrier to get partner businesses was the business managers' ignorance about the ECST. Other handicaps to surmount were that sometimes business cultures were not oriented to the ECST values, or that they had not a clear idea about the implications of being a Charter partner, or that they were not sure about their competence to meet the ECST obligations. Consequently, to come through all of these obstacles, the CAMs

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<sup>5</sup>In July 2010.

insisted on the advantages that a coordinated work could report to the enterprises, such as getting a more effective promotion, achieving a highly specialized environmental differentiation, benefit from advisory services, improving their management, or reaching environmentally sensitive tourist segments. Above all these good reasons to join the ECST, the major motivation for businesses'adhesion, from the point of view of the CAMs, was to get an European distinction which facilitates the touristic development of the area and specifically their promotion tasks. Secondly, they were motivated by the possibility of enhancing their qualification on environmental management by learning from the ECST supporting training programs.

Evaluating the observance of the Charter commitments, most of the CAMs, the 87%, considered that Charter businesses prefer acquire local raw materials, rather than import them, sponsoring local products to provide visitors with authentic quality experiences during their visit. Additionally, the 85% manifested that Charter businesses provide a warm host to the tourists and facilitate maps and brochures to make them fairly appreciate the worth of the protected area. Furthermore, they often provide and support activities, events and packages involving the interpretation of nature and heritage. As well, they expressed that partner businesses encourage customers' respectful behavior with the local residents. Consequently, it could be generally stated that the partner businesses particularly care for all the front stage aspects, contributing to offer an authentic and quality image of the protected area. On the other hand, concerning to other managerial aspects, from the back stage, the CAMs absolutely agree that Charter businesses try to minimize impacts of their activities, establishing selective waste collection systems or investing on sewage treatment infrastructures. Finally, from a negative viewpoint, one Charter Area admitted that one of their Charter businesses unsubscribed the ECST. When the CAMs were asked about the most important disadvantages found by the Charter businesses, they supposed that some Charter businesses were disappointed because they expected a greater promotional effort by EUROPARC, pushing and allowing them to achieve a greater differentiation from their non-Charter competitors. Therefore, the managers judged that the Charter Areas should be better promoted. Apart from this, the CAMs reported difficulties to coordinate the wide range of different actions on templated in the Charter, as well as the ones included in their action plans. Coordination problems also emerged into the daily management of the forum, since mobilizing actors, engaging them, and encouraging their contribution, becomes Titans' task in the practice, finding the forum dynamization a quite complex assignment. On account of all these motives, the lack of supporting staff to implement the action plans is revealed as a major weakness to be faced. Elaborating on this topic, it was founded that the absence of tough funding behind the ECST represents the root of the main problems encountered in CAMs daily management. Lastly, and related to the preceding, the CAMs criticized the weak governments' involvement with their Charter projects.

Concerning to the CPBMs questionnaire, the respondents were accommodations, the 55%, restaurants, 4%, suppliers of leisure activities, the 17%, and the rest offered a diverse range of services as environmental education. The 83% of the interviewed joined the Charter between 2009 and 2010, and only three enterprises joined the Charter before 2007. On the subject of customer acquisition, generally, the CPBMs did not consider that being a Charter partner has facilitated their marketing actions. Merely a 10% believed that being a Charter partner have amplified their customers. As a counterpart, they recognized an increase in their costs as a consequence of the adhesion. However, 90% of them considered that this cost raise was not very significant. Significant differences were not found in these opinions depending on the type of services offered by the companies, so neither the accommodations nor the restaurants or leisure activities enterprises experienced a hard raise on their manufacturing costs. On the subject of the main disadvantages the CPBMs found in being a Charter partner, the 23% answered they did not find any disadvantages. However, the 44% expressed that they spend a lot of time on bureaucratic procedures, increasing their workload. Another disadvantages, identified by the 23%, were related to the operating costs of the adhesion, such as the modifications needed on the advertisement and brochure designs, or the high cost of ecological raw materials, or the transport expenses due to meetings attendance, or the needed investments to renovate their infrastructures or to get new ones without any financial support from governments. More inconveniences were, for some of them, the difficulty to find local raw materials with the necessary quality, or the possibility of losing customers because of the limitation of the number of visitors. Additionally, a 13% of the respondents were disappointed with roll played by administrations and local governments, since they expected more implication and supporting from them. Even more, some CPBMs uttered that the involved institutions were often not enough qualified to solve the practical problems, emerged after the adhesion. Finally, other strong critics were that touristic packages were not efficiently promoted, that the Charter businesses did not enjoy special privileges against non-Charter businesses. Subsequently, a 5% of the respondents claimed for a greater marketing support by the EUROPARC. In spite of all of the complaints, the CPBMs considered that there were many positive points in being a Charter partner, given their answers to an open question where they were asked to specify the advantages of being a Charter business. Firstly, the 64% revealed that their relationship with the protected area managers, as well as with other enterprises from the Charter area, had visible improved. They appreciated the benefits from belonging to a net, and the advantages that collaboration reports them. Secondly, the 43% answered that their business had benefited from institutional publicity and promotion since they are a Charter partners, reinforcing their brands

and communicating an ecological and environmental concerned image to the market. This last figure does not cease to be a little disconcerting, because many entrepreneurs complained about exactly opposite: the deficient promotion. Thirdly, the 40% considered that they have improved specifically their service quality and, in general, their organizational procedures. Probably, this is a consequence of the upgrading in their qualification, thus the 32% viewed the adhesion as an opportunity to update their knowledge. As a result, CPBMs reviewed that their customers are more satisfied than before. In addition, the 26% got energetic saves, reduced their consumptions, or improved their waste treatment methods due to the investments accomplished to meet the Charter principles. Some of them expressed that their employees and their customers were more environmental aware, behaving more respectfully than before the adhesion. Thus, their businesses became more sustainable thanks to the Charter. Finally, a tiny group, integrated just by a 7% of the respondents, emphasized as the main advantage of the adhesion the growth of their sales figures with their reservations, due to the boost in park visitors. Additionally, the CBPMs were asked about more specific questions related to their management, requesting them to indicate the extent to which their companies had changed their management in order to fulfill the commitments assumed by the Charter. Although the 95% of the Charter Partner Business manifested that their customer typology have not vary after the adhesion, and the 64% of them affirmed not to have modified their offer, a 36% of the CPBMs declared to have enhanced their products and services. The changes introduced were focused on procuring a warmer welcome and host of the tourists, 63% of agreement; on improving their facilities to make them more comfortable, 69% of agreement; as well as designing new touristic products and services in collaboration with other Charter Partners, 67% of agreement. However, the improvements undertaken were less often referred to changes in raw material providers to work with local providers, 52% of agreement. Regarding to their marketing activities, the 66% had collaborated with the CAMs to develop joint communication actions without seeing increased their promotion expenditures, thus the 75% did not expend more resources in promotion after the charter adhesion. Unfortunately, the 81% had not amplified their effort to cooperate with specialized travel agencies in order to increase their sales. However, the 47% viewed their sales increased after joining the Charter. Finally, the vast majority of the CPBMs contributed to preserve the protected area, thus most of them observed a wide range of procedures to achieve this goal: educating their clients and employees on environmental values, 80%; protecting and respecting the local people's quality of life, 92%; taking care of the preservation of the protected areas, 96%; developing actions to reduce consumptions, 75%; or collecting the waste selectively, 89%. The unique action that the mainstream has not done until last year is to invest on sewage treatment systems, 24%.

## **DISCUSSION, CONCLUSIONS AND FUTURE RESEARCH IMPLICATIONS**

After the presented analysis, it is concluded that the adhesion to the ECST provides valued advantages for CAMs and CBPMs. The usefulness of the ECST is undeniably since it makes possible to establish a network among all actors involved in the tourism management of the protected areas, creating a communicative framework where collaboration becomes easier. Furthermore, the ECST increases awareness and environmental education, which leads to improve the management of the protected area, as well as the Charter partner enterprises. The immediate consequence is a service quality improvement, and the subsequent better satisfaction of visitors. Additionally, the better qualification of the touristic agents represents an important indicator of the ECST success, in view of the fact that this aspect had been diagnosed in previous studies as a significant handicap for the implementation of sustainable tourism management models. Apart from these advantages, several problems arising from the implementation of the ECST have been identified, because its execution requires an important organizational effort, especially in terms of time, more than in monetary terms. One of these disadvantages is the bureaucracy, habitually derived from coordinative tasks between many touristic actors who sometimes have divergent interests, which require enlarging the protected area staffs to facilitate the management of the additional workload. This, ultimately, leads to assume economic efforts, in addition to those resulting from the investments and the necessary expenses undertaken to meet the ECST philosophy. Consequently, the main ECST weakness is that it has not been complemented with a robust funding program. So, the more skilled protected areas to get funds will have an advantageous position, and will be able to implement better the ECST than those who fail in acquiring funds. Possibly because of this, it was noticed a different degree of involvement and success across the analyzed Charter areas. Lastly, another discovered disadvantage is that, although the respondents thanked the Charter for offering an environmental quality distinctive and for being benefited from promotions, it is believed that the ECST promotion done by EUROPAC is not satisfactory, thus many tourists do not recognize it, and therefore, they are not able to distinguish between Charter protected areas or non-Charter areas, or between affiliated enterprises or non-affiliated.

Finally, based on the foregoing, it is recommended for Monfragüe, in order to succeed in the implementation of the ECST, to designate a ECST responsible in the protected area, devoted to coordination and fundraising. Ultimately, it is advised for the Charter enterprises to strive on marketing tasks, principally encouraging

collaboration with specialized travel agencies and, at the same time, taking advantage from the ECST as a distinctive quality symbol in their target markets.

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# **SUSTAINABLE TOURISM, DEVELOPMENT AND THE DISCERNING TRAVELER: CONCEPTUAL DEVELOPMENTS AND ETIOLOGICAL LINKAGES BETWEEN SUSTAINABLE TOURISM, POSTMODERNISM AND THE DISCERNING TRAVELER**

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## **ABSTRACT**

This paper, in examining current trends in tourism theory and practice and while acknowledging criticisms of theoretical development in the area, explores the conceptual linkages between postmodernism, sustainability and development. Having described the positive and negative impacts of tourism, it analyses the relationship between the postmodern ‘discerning traveler’ and sustainable tourism and positions this among current theoretical developments. It explains the characteristics of various discerning travelers and highlights the implications of these for governments, tourism authorities and companies. Finally, the study provides practice examples of destinations which embody postmodernist values and attract the high-end, low-impact discerning traveler.

**Key Words:** sustainable tourism, discerning traveler, postmodernism, environment

## **INTRODUCTION**

The turbulence of the 20<sup>th</sup> and early 21<sup>st</sup> centuries has yielded massive demographic, intellectual, economic and lifestyle changes. It has also transformed our values concerning communal and individual responsibility and altered how we interpret the world (Zahra and MacIntosh, 2007). These changes are apparent in the attitudes of the postmodern traveler and carry serious implications for the future of tourism. However, they have not been fully investigated academically.

Rightly or wrongly, tourism has been criticized as lacking scholastic depth and critical theory (Veal, 2002; Botterill, 2003), with Jones (2004) describing it as an intellectual void, and others noting a preoccupation with operational management (Taylor and Edgar, 1999). This paper seeks to answer these criticisms in part by demonstrating the linkages between sustainability, postmodernism, development and the discerning traveler.

The influential, but still controversial, intellectual current of postmodernism is apparent in Urry’s “tourist gaze”, building on Foucault’s earlier “medical gaze” (Foucault, 1980; Urry, 2002). Postmodernist approaches bring a theoretical depth and contribute to tourism research by highlighting the variegated and situational nature of experience (Hottola, 2004). Postmodernism seeks a critical engagement with the modern era – not its replacement, endeavoring to extract meanings from the complexity of human life worlds with which the traveler interacts (Hottola, 2004). Tourism, in this context, is not simply a major commercial activity nor the intellectually impoverished child of management studies, but rather an enriching, optimistic and deeply significant pursuit.

From this viewpoint, some perceive tourism as part of a search for meaning, providing a lens through which societal complexity is viewed and organized (Zahra and MacIntosh, 2007). “Mindless hedonism and pleasure seeking are no longer fashionable” (Singh, 2004) nor is template travel or “fordism” (Haanpaa, 2005). The postmodern traveler is different.

## **ADVANTAGES AND DISADVANTAGES OF TOURISM**

Tourism is “between leisure and work, home and away, everyday and holiday” (Urry, 1990). It is about escaping the drudgery of the prosaic for the exotic and the other. It is often about affluent people from fortunate places visiting poorer people in developing locales (O’Reilly, 2007).

The longstanding debates about whether tourism is a boon or a curse are familiar but persistent, with the advantages and disadvantages falling into three main categories:

- Economic
- Socio/cultural
- Environmental

Economically, the travel and tourism industry is one of the most important sectors of the global economy (World Travel and Tourism Council, 2010). From 2004 to 2007, the average Gross Domestic Product (GDP) growth of this sector was 3.6% and, over the long-term, travel and tourism remains one of the world's fastest growing industries (World Travel and Tourism Council, 2010). In regard to local economic impact, the tourism industry has created 204 million jobs world-wide, contributing to about 19% of the world's workforce (Hassan, 2008).

Aside from the creation of direct and indirect employment, tourism can stimulate the growth of locally made products and provide significant multiplier effects as expenditures are recycled through communities. Furthermore, the industry provides major increases to state and regional revenues and facilitates the development of local and national infrastructure.

From the social and cultural perspective, tourism provides a number of benefits. It can increase educational opportunities, preserve local cultures, reinforce identity and enhance human rights. Environmentally, postmodern tourism particularly can lead to an increased consciousness of the importance of the environment and local ecologies, and measures to lessen pollution (Coathup, 1999). In this area especially, tourism has goaded some governments into formulating and implementing policies aimed at habitat preservation and sustainability.

However, we are all familiar with the downsides of tourism, including economic exploitation, cultural devastation and, most famously, destruction of the environment, especially in mass tourism destinations (Singh, 2005). These problems could be greatly exacerbated by the predicted increased numbers of tourists (Hassan, 2008).

Economically, there can be significant leakage of funds and resources away from localities, import substitution and destruction of local trades, skills and economies, increased prices of staples and land, and wholesale dependence on tourism. It may restrict local access to jobs in the industry and reduce employment through the destruction of lifestyles, resulting in relative poverty and mendicancy.

Socially, mass tourism has often led to corruption, the displacement of indigenous people, deterioration of local cultures and loss of identity, the exploitation of women and children, increased economic inequality, crime and conflicts over land, traditional customs and law.

In regard to the environment, unsustainable tourism has had three major effects:

- Increased pressure on natural resources (e.g. deforestation, land degradation)
- Pollution (e.g. unmanaged waste disposal, high energy resource consumption, air, water and land pollution)
- Damage to ecosystems (e.g. wildlife and habitat destruction, indiscriminate clearances, damage to reefs, pollution of beaches) (Singh, 2005).

Most commonly, it is governments, tourism companies and authorities that facilitate these transgressions and certain types of tourists who unwittingly conspire in perpetrating them. Most threatening to sustainability are mass and charter tourist firms and travelers, while what used to be called elite tourists are least likely to be attracted to places which are exploitative or environmentally offensive (Choibamroong, 2003).

In reaction, efforts have been made to avoid the devastating negative economic, social and environmental impacts of this avalanche of travelers. Most notably, the search for a tourism that conserves rather than destroys, together with the sustainable development movement, has led to the emergence of sustainable tourism.

## **SUSTAINABLE TOURISM**

Sustainable tourism now completely dominates the discourse on ethical travel (Tribe, 2006). Most interpretations of sustainable tourism address environmental threats, with only a few dealing with the three dimensions of sustainability—economic, social, and environmental (Butler, 1999).

Eber (1992) provides a comprehensive definition: “Sustainable tourism is tourism and associated infrastructures that: both now and in the future, operate within natural capacities for the regeneration and future productivity of natural resources; recognize the contribution that people and communities, customs and lifestyles, make to the tourism experience; accept that these people must have an equitable share in the economic benefits of local people and communities in the host areas” (Eber, 1992).

The World Tourism Organisation defines sustainable tourism as tourism that meets the needs of present tourists and host regions while protecting and enhancing opportunity for the future (Institute for Tourism, 2010). This complements the post materialist values of postmodern society, no longer the throwaway society, emphasizing the role and responsibility of the individual in making ethical, sustainable choices (Haanpaa, 2005). This dominant discourse underpins all ethical tourism activities and is integral to all aspects of the industry’s development and management.

## **SUSTAINABLE TOURISM AND THE DISCERNING TRAVELER**

Perionova (2005) provides a limited typology of tourists as organized mass, individual mass, explorers and drifters. She notes that each type impacts differently on the locals and the environment. Choibamroong (2003) offers various categorizations, including the elite tourist who has some similarities to today’s high-end discerning traveler. Haanpaa (2005) notes the dominant trends in tourism as fordism, prepackaging and postmodernism, with postmodernism manifested in firstly, the hyper real and secondly, the ecological and ethically responsible.

Tepalus (2000) remarks that a variety of tourists, not simply the elite or high-end, have become increasingly discerning and conscious of sustainability. She notes the increased proportion of comparatively wealthy, ecologically conscious, older tourists who “were the mass travelers of the 1960s and 70s, and are today’s discerning and sophisticated travelers with the means and the will to travel” (Tepalus, 2000).

For the discerning traveler, tourism concerns experiences rather than products, a search for destinations that provide community, security, leisure, and tranquility or learning and adventure. MacCannell saw the discerning traveler as a pilgrim, in search of authentic experiences and even a way of life (MacCannell, 1999).

Postmodern value systems and beliefs are dominated by quality of life, lifestyle, freedom and health (Haanpaa, 2005) and postmodern tourism is highly personal and experiential (Zahra and MacIntosh, 2007). The discerning postmodern traveler, “is searching for new experiences, is concerned about the environment, is interested in taking part in a health/well-being lifestyle and wants to experience the local culture.” (Yeoman, 2008).

According to Boniface and Cooper (2005), the discerning traveler has the following characteristics:

- knows what he/she wants in terms of quality, service, and value for money
- is concerned about the environment and the ethical consumption of tourism
- is experienced, able to compare destinations and products
- is flexible and spontaneous in travel arrangements
- has considerable consumer and technology skills
- is motivated by experience, e.g. wanderlust, culture, learning, curiosity, not by products.

So, although there is still no shortage of mass and charter tourists, trudging around markets and temples, following the leader’s flag and megaphone, there is now a critical mass of experienced and discerning travelers. These are not all wealthy, of course, but some are and, unsurprisingly, postmodern values tend to predominate among those individuals and societies where there is a high level of affluence (Haanpaa, 2005). These wealthy postmodernists we will refer to as high-end discerning travelers.

## SUSTAINABLE TOURISM AND THE HIGH-END DISCERNING TRAVELER

High-end discerning travelers have the same concerns and desires as other postmodern tourists but with this key difference: because cost is not the major issue for them, they will only patronize tourism experiences which are the best in their class. The high-end postmodern tourist is concerned with individualization of destinations rather than expense. They are flexible and value moving across a variety of experience (Uriely, 1997). Although financially similar to the old elite travelers, they exhibit postmodernist values, being seriously concerned about ecological and ethical issues and technologically adept.

It is about standards and ecological responsibility (Haanpaa, 2005). Tourism providers will increasingly have to meet the needs of the postmodern discerning traveler - more environmentally aware and much more sophisticated (Jefferson, 1995).

As Jefferson (1995) notes, “they are today’s sophisticated and discerning travelers with the means and will to travel. They expect high standards.”

This high-end discerning traveler is financially very attractive to governments and tourism firms. However, they are time-poor and cash-rich. They expect ease of consumption and the opportunity to experience, unwind and relax. They will not tolerate uncaring staff or management, stress, disorganization or inattention to detail (Semone, 2008).

Tourism authorities and companies should note that these travelers expect more than simple functionality. The tendency of some providers to performativity, i.e. minimum input for maximum cash return, does not attract the high-end discerning traveler (Tribe, 1997).

Being concerned with quality, not cost, places pressures on destinations to ensure that they are ‘the best in their class.’ The high-end discerning traveler is like other postmodern tourists - “a child of the information technology age, a sophisticated and discerning consumer increasingly alive to ‘green’ issues” (Jefferson, 1995). To attract them, a destination must match their aspirations and be the best of its kind. So, what sorts of places attract this postmodern, high-end, discerning traveler?

### ‘THE BEST IN THEIR CLASS:’ DESTINATIONS THAT ATTRACT HIGH-END, DISCERNING TRAVELERS

#### ***The Point, Saranac Lake, Adirondack Mountains, New York.***

*The Point* has, for many years, been considered by hospitality experts as the model of its genre—the best resort in its class (Won, 2010).

“Perhaps no other country house hotel - or resort anywhere - has been so widely recognized for its excellence as *The Point*...considered the premier hideaway in the U.S., it’s the one against which all other upscale resorts have been measured.” (Murray, 2003)

The discerning traveler is seeking not a product, but an experience (MacCannell, 1999). Therefore, at *The Point*, attention is paid to individualization (Haanpaa, 2005). For example, as a private home, all bookings are handled by telephone interview. The discerning traveler joins a house-party as a private guest in a very special place. To ensure a “memorable” experience (Gretzel and Fesenmaier, 2003), guests are not presented with a bill upon departure. Instead, payment in full is made at least 30 days before arrival (average room costs \$2000) and everything’s included. No extras and no tipping.

Contributing to sustainable tourism, all purchasing, recruitment and training is done locally. The first year the staff numbered three and now, with 32 local employees, *The Point* is the largest employer (and tax payer) in the county. Being chosen to be a member of *Relais et Châteaux* is an honor and provides the validation of excellence, the best in its class, sought by high-end discerning travelers (Coathup, 1999). When *The Point* became joined in 1982, there were only three other members in the United States. Today, there are still less than 50.

#### ***Little Governor's Camp, Masai Mara Game Reserve, Kenya***

Little Governor's Camp deliberately targets the postmodernist values, as described by Haanpaa (2005), of the high-end discerning traveler. The camp has only seventeen tents, each with comfortable beds, a desk, a rack for clothes and a tile-floored, bathroom tent with a basin, a shower with hot and cold running water and a modern flush ‘loo’. Days are spent on safari drives and, at night, guests can observe the hippopotami, giraffes and

elephants that come to the lake. It provides a unique, eco-experience as proposed by Gretzel and Fesenmaier (2003).

#### ***Les Crayères, Reims, France***

Pritchard and Morgan (2006) point out that special hotel experiences are under-explored in postmodern tourist literature. *Les Crayères*, a member of *Relais et Châteaux*, is an historic chateau in the center of the champagne region of France. It is also one of the most distinguished restaurants in the world. This special hotel experience (Pritchard and Morgan, 2006), combining comfort, precise service, brilliant cuisine and a beautiful setting, attracts the postmodern, high-end discerning traveler.

#### ***Tawaraya, Kyoto, Japan.***

The postmodern tourist is attracted by the unique and situational (Hottola, 2004) and the individual and the select (Yeoman, 2008). *Tawaraya*, Kyoto's oldest ryokan (traditional-style inn), has been managed by the same family for eleven generations. Until recently, *Tawaraya* was so exclusive that accommodations were only available through the personal recommendation of a previous guest. *Tawaraya*, aims for an experience of luxury, simplicity and sustainability.

#### ***Four Seasons Tented Camp, Golden Triangle, northern Thailand.***

For the discerning traveler, a destination must embody the key postmodernist values - health, freedom and quality of life (Haanpaa, 2005). The experience must meet individual needs, while being ecologically and ethically sound (Haanpaa, 2005). In the 21<sup>st</sup> century, peace, time, and solitude are three of the most valued commodities. Like *The Point*, *Four Seasons Tented Camp* has all three and appeals to the cash-rich, time-poor, discerning traveler (Semone, 2008). The postmodern tourist is flexible and searching for new encounters (Yeoman, 2008). *Four Seasons Tented Camp* provides a memorable experience of "roughing it" in style replete with gourmet meals. Discerning travelers do not wish to simply "be there" but wish to participate in and "experience the there" (Gilmore and Pine II, 1999). This destination satisfies that desire, e.g. elephant mahout training, and attracts high-end, discerning travelers from all over the world.

*Four Seasons Tented Camp* is the Thai version of *The Point*: same procedures, same atmosphere and camaraderie between guests and staff, and, at approximately \$2500 per day, similar cost. In October 2010, for the third consecutive year, the readers of *Condé Nast Traveller* voted *The Four Seasons Tented Camp Golden Triangle* as the number one property in the world.

#### **Summary**

These 'best' destinations are outstanding examples of sustainable, postmodernist tourism. By being the best, they attract the high-end, discerning traveler and the region benefits economically, socially and environmentally. The downsides of tourism are reduced or even eliminated and the upsides maximized.

#### **CONCLUSION**

This study has described the upsides and downsides of tourism and the characteristics of postmodern discerning travelers, general and high-end. It has demonstrated their importance to sustainable tourism and thus to the industry overall. Given the reality of increasing tourist numbers over the next few decades and the potential negative impacts that this can have—economic, social and environmental—governments and others involved in the industry need to prioritize sustainable tourism policies. The paper has offered an achievable objective and strategy, to complement policy change, for maximizing the upsides and minimizing the downsides of tourism: attracting the discerning traveler, particularly the high-end traveler. Also presented have been some examples of destinations which have successfully implemented postmodern tourism values and policies and appealed to the high-end discerning traveler by understanding their characteristics and meeting their requirements. Governments and commercial interests can advantage both localities and themselves by targeting the postmodern discerning traveler, particularly the low-impact, high-end discerning traveler.

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# STUDY ON THE APPROACHES TO GET THE SATISFACTORY BALANCE BETWEEN TOURISM AND THE PROTECTION OF HISTORIAL MONUMENTS ON THE CASE STUDY OF THE SUMMER PALACE

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## ABSTRACT

As the rapid development of Chinese Economy, tourism also has experienced significant growth in China. More and more people select to travel or visit the historical monuments, special some famous historical monuments to spend their leisure time. This kind of selection aroused a big congestion and damage of the historical monuments. The purpose of the study was to discover the effective approaches to get the satisfactory balance between tourism and the protection of historical monuments. A survey was conducted among the people who visited historical monuments before. The problems causing the congestion and damage of historical monuments were probed and how a satisfactory balance could be achieved between tourism and the protection of historical monuments was examined. The Summer Palace was taken as the case study. Finally the study indicated the approaches to get the satisfactory balance between tourism and the protection of historical monuments, that was to strength the strategic planning and management and extend the degree of satisfactory balance, to adjust the tourism market and keep the balance of the number of visitors and improve the accessibility of the roads in historical monuments.

**Keywords:** Tourism, Historical Monuments, Visitors' Satisfaction, Approaches of Protection

## INTRODUCTION

The Chinese economy has experienced a steady increase in the past three decades and peoples' disposal income also has risen greatly. The GDP per capita already reached 3000 US dollars in 2007 and the unbalanced development caused the eastern area has even higher growth. When the GDP per capita got the 3000 US dollars, there would be a prompt development in mass tourism industry (Wei, X. 2004). However, the sharp increase of the domestic and international visitors led to congestion and damages of the tourist attractions and the dissatisfaction of the visitors, especially in some famous historical monuments. In Mogao Grottoes, Dunhuang, because of the breathing of so many visitors, the color of the wall paintings faded. In Temple and Cemetery of Confucius, and the Kong Family Mansion in Qufu, the visitors stepped the grass and plants on the tombs. Wenchang Yuan, as the concentrated historical sites in the Summer Palace, when the visitor's flow arrived at 400 person per hour, the earlier close makes the visitors can not enter and caused many complaints (Anonymous 2010). So the research on the satisfactory balance between tourism and the protection of historical monuments was becoming very critical and significant recently. Many researchers took attention on the dilemma. Mathieson and Wall (1982) examined that carrying capacity was the permission to the place for the maximum of the people under the context that there is neither unchangeable damage to the natural environment and nor the unaccepted quality decreasing on the tourist's experience. On the one hand was the considerable increase in tourism and on the other hand was the damage of the valuable historical relics. In order to indicate the approaches to get the satisfactory balance between tourism and the protection of historical monuments, this study probed the reasons caused the congestions and damages to the historical monuments. A survey with questionnaires was conducted among the visitors of the Summer Palace. The interviewees include the local visitors; some of them even have been the Summer Palace three times and the visitors from the other parts of China. On the base of case study, a relatively objective conclusion was drawn from the investigation results.

The satisfactory balance between tourism development and the protection of historical monuments should be defined as an important research topic by both practitioners and academics. The overcrowded visitors broke the limited point of the carrying capacity and brought the big problems for the sustainable development in tourism. The study aimed to find effective measurements to get the satisfactory balance between tourism development and the protection of historical monuments. About the main research question, the study addresses the following three sub-questions: firstly, the need and behavior of the visitors were discussed. This was the major reason caused the problem between the tourism development and the protection of historical monuments. Then the main problems in the planning and management of the protection associated with the selected member's age, gender, length of residence, and level of education were probed. Finally, the effective approaches to solve the congestion and damage problems and protect the historical monuments were shown.



## LITERATURE REVIEW

Satisfactory balance between tourism and protection of historical monument is an idea state for sustainable development. It is also named as the suitable carrying capacity of scenery spot, attractions or historical monuments. The carrying capacity defines as a measurement with the ceiling and floor. If the satisfactory balance is over the ceiling threshold, it will cause the damage of the culture relics; conversely, if the satisfactory balance is lower than the floor threshold, it will hind the development of the historical monument (Yang, X., Luo, X. & Liu, W. 2008). From this point of view, the satisfactory balance is the primary source of future revenue and is regarded as the key factor in winning market share. In academia, the satisfactory balance has been a popular topic since the early 1960s. In order to have a sustainable tourism destination, the environmental, economic and social impacts must be monitored and bring to an acceptable level for visitors, and business interests. Donald Getz (1983) points out that a subsequent identification of possible capacity thresholds under the headings of six capacity criteria: physical (tangible resources), economic, ecological, social/cultural, political/administrative, and perceptions of visitors. Some researchers treat tourism as the positive factors to the protection of the historical monuments. Bryan H. Farrell and Robert W. McLellan (1987) suggest that tourism, as an element of importance in the regional economy, needs to be appreciated and its relevance to large numbers of organizations acknowledged. Only with awareness there is healthy tourism going hand in hand with environmental welfare. More and more tourists bring the big revenue and provide the possibility and capital to maintain and protect the historical monuments. At the same time tourists expect comfortable atmosphere, convenient facilities, gracious and prompt services. The growing importance placed on studying impacts from a destination perspective also makes the support for tourism development more possible and enables policymakers to enhance the quality of life for the community (Chen, J. 2001). According to Ap (1992), social exchange theory allowed the investigation of both positive and negative attitudes to tourism in a destination. The benefits of tourism were the employment opportunities, tax revenues and improved quality of life (Perdue, R.R., Long, P.T. and Lew, A. 1990). Costs include increased traffic jam, noise, and deterioration of natural resources and historical relics (Chen, J. 2001). Conversely, those who view the costs higher than the benefits would not support tourism development (Harrill, R. 2004). Xiao, Zh. and Zhao, X.,(2003) research on the estimate means of carrying capacity of tourism and utilize the faintness linear programming model to calculate the exact amount of a tourist destination or a museum. The is that the comfortable carrying capacity is 5-12 persons for a museum or 4-10 persons for a park in 100 square meters. The maximum carrying capacity can be 50 persons in the same big area, but the visitor's experience and feel are extremely different. Although there has been a growing amount of study on the perceived economic, social, and environmental impacts attributed to tourism in a destination, these literatures have concentrated on tourism as an entire industry and have not taken into account the different types of tourists. Therefore, how to achieve the satisfactory balance between the tourists and the protection of the historical monuments is significant to explore further.

## DESIGN OF THE INVESTIGATION

The instrument designed for this study was comprised of three stages, the first stage is the outline of the whole research, it includes the definition of the research question, the results of finding the related papers and also the planning of the work schedule, then is the design of the questionnaire, the last part is the collection of the data and analysis. The questionnaire is composed of three sections. Section one in the questionnaire was to definite the right people who experienced the Summer Palace, and for the objectives of the survey, the people whose family members, friends or relatives working in the Summer Palace was eliminated the interviewees. Section two includes five questions and asks demographic information of the respondents. Demographic items on the questionnaire compasses gender, age, and length of residence and level of education. Section three includes 16 formal questions addressed the needs and behavior of visitors. A five-point Linker scale was used as the response format. The study utilized the software of excel to analyze the data.

## METHODS AND PROCEDURES

### Study area description

The Summer Palace or Yihe Yuan lies in the northwestern outskirts of Beijing. It is up to now the best preserved and the largest imperial garden in China. Its spectacular scenery and consummate comprehensive planning is worthy of a gardening classic and a world-famous garden treasure. The Summer Palace is mainly dominated by Longevity Hill (60 meters high) and the Kunming Lake. It covers an expanse of 2.9 square kilometers, three quarters of which is water. The central Kunming Lake covering 2.2 square kilometers was entirely man made and the excavated soil was used to build Longevity Hill. In the Summer Palace you can find a variety of palaces, gardens, and other classical-style architectural structures. In December 1998, UNESCO included the Summer Palace on its World Heritage List. It declared the Summer Palace "a masterpiece of Chinese landscape garden design. The natural landscape of hills and open water is combined with artificial features such as pavilions, halls, palaces, temples and bridges to form a harmonious ensemble of outstanding aesthetic value." It is a

famous historical monument, a popular tourist destination but also serves as a recreational park. Annually the Summer Palace reception amount is nearly 5.2 million visitors and just after the Bada Ling Great Wall in Beijing. Once it accepted 92,000 visitors in one day in National Day holidays (Anonymous, 2008) and this number is the highest one in the whole Summer Palace history. But Oct4th, 2010, the Summer Palace accepted 107,600 visitors and in the whole Golden week holidays, the total number of the visitors is 461,000(Anonymous, 2010).

### Data collection and instrument design

The data was collected through questionnaire administered by field research. A face to face survey was the most appropriate method as it allowed reaching truthful information from the participants spread across the certain geographical area in a period of time. The survey lasted for one day.

First, related materials and research program are checked, interview outline and questionnaire are designed. Next, interview of intermediate or senior managers who work in the Summer Palace are conducted. Then, unconditional survey was carried on the people who visited the Summer Palace before. Finally, questionnaires and data analysis processed.

## RESULTS

Table 1

The influential factors on the satisfactory balance between tourism development and the protection

Questions	Options	Frequency	Percentage (%)	
The time when visitors like to visit the Summer Palace.	Spring Festival	0	0	
	May Day holidays	47	33.5	
	Qing Ming Festival	0	0	
	National Day Golden Week Holidays	63	45.0	
	Mid-autumn Festival	10	7.1	
	Weekend	20	14.2	
	Other time	2	1.4	
	The top five influential factors on the visitor decision-making.	Beautiful scenery	128	91.4
Facility of entertainment and fitness		7	3.5	
Clean and hygienic environment		120	85.7	
Convenient transportation		71	50.7	
Excellent food service		11	7.9	
Advanced commercial facility		2	7.8	
Historical culture		140	100.0	
Rational price		16	11.4	
Security guarantee		79	56.4	
Friendly atmosphere		73	52.1	
Entrance price		34	24.2	
Near to the place you stay		19	13.6	
The most needed service in the Summer Palace		Forecasting the visitors number	79	56.4
		Control the entrance	20	14.2
	Better distribution system	41	29.2	
The most important work for visitors to do in the protection of historical relics	Rationally select the visiting time;	42	30.0	
	Abide by the rules of management;	58	41.4	
	Possessing the protection conscience	37	26.4	
	To be off the bad behaviors	3	2.1	

There are overall 100 questionnaires from indoor interviewers and all of them are effective and the effective rate is 100%; 50 questionnaires from online interviewers the effective ones are forty and effective rate is 80%. Among all the interviewees, 90 of them are female, 50 of them are male; 80 of them are in age 36-40, 60 of

them are in age 31-35; 120 of them are got married and 20 of them are single; 130 of them live in Beijing more than half a year and ten just stay one week; 80 of them are Master degree students and 20 of them are PhD candidates and 40 graduated from university.

From the section three of the questionnaire, 16 questions can be classified into five parts. In the first part, 42.8% of interviewees regularly visit the historical monument in autumn, 35.7% of them regularly select spring, and 21.4% of them select summer to visit the Summer Palace. And during all the regulated holidays, the National Day holidays is chosen by 45% people, the May Day holiday is selected by 33.5% people, and weekend chosen by 14.2% people. The most popular season is autumn, followed by summer and spring, and winter is the season that less people enjoy. The most comfortable time for people to visit the Summer Palace is National Day Holidays, followed by May Day holidays. Spring Festival and Qing Ming Festival are not chosen. At the same time, Mid-autumn Festival is selected by 7.1%.

In the second part, not surprisingly, the Forbidden City is selected by 47.8%, 43.5% and 12.5% respondents wrote down the Summer Palace and the Great Wall as their most familiar historical monuments in Beijing. 62.4% respondents select the knowledge as the reason for visiting, and 15.7% of them for the beautiful scenery and 18.5% respondents prefer the leisure time.

From the third part, 42.8% people choose to visit together with friends and classmates, 57.1% people choose to visit with relatives and family members. Among all respondents, 70 of them drive car by themselves, 50 of them select the bus and 20 of them select to ride the bicycle.

In the part four, respondents are asked to evaluate the protection work of the Summer Palace and 12 selections are prepared for the interviewees and ask them to choose the top five ones. All of the respondents select “the architecture and historical relics” as the most impressive or special item; and 91.4% of them visit the Summer Palace are for the beautiful scenery; 85.7 of them enjoy the clean and hygienic environment. 56.4% of the respondents select the security guarantee as the factor to influence the visit in the Summer Palace. And about the mostly demand matching facilities in the Summer Palace, 40% of the respondents select the visitors center; 33.5% of them choose the guider and 15% of them select the multi-functional restroom. About the most important work for visitors to do in the protection of historical monuments, 41.4% of respondents select “abide by the rules of management”, 30% of them select “rationally select the visiting time” and 26.4% of them select “possessing the protection conscience.”

In the part five, respondents were asked to give their evaluation to assess perceived quality of protection, including attractions, food and accommodation, transportation, and environment. In answer the last open question “which service facility of the Summer Palace are in most needed”, nearly 50% of the respondents suggest to control the entrance; planning the distribution system and visitor’s center; training the guiders; increasing the entrance fee in the pop seasoning, etc.

The result of survey shows the intentions, demands and behaviors of most of the visitors. Firstly, the visitors’ preference on the historical monuments and concentrated visiting time lead to the crowd and congestion and also damage the environment, facilities and heritage in it. For instance, all of the respondents appreciate famous historical monuments with high recognition to visit, and the Great Wall, the Summer Palace and the Forbidden City are their first three choices and 80% respondents appreciate to select the autumn and the summer to visit, especially in the National Day Golden week holidays. Next, the management in the Summer Palace still is needed to be improved in the future. According to the average visitor feedback, the satisfactory degree in Beijing is very high, but in the survey 37.1% of the respondents select good, 40.7% of them select general and 21.4% people select bad. Finally, the purpose for the most visitors is for the knowledge, the cultural heritage is the core of the historical monuments and heritage is the main motivating factor for the visitors.

## CONCLUSION

This study clarifies that satisfactory balance between tourism development and the protection of historical monuments is a big challenge to the rapidly developing tourism. Firstly, the more successful the planning and management, the fewer the impacts and the greater the carrying capacity will be realized. For instance, the calculation of the visitors can not be realized as well as the control of the entrance in the Summer Palace because the ticket selling is man-made instead of the computer system. The out-of-date management and technology caused the overcapacity and led to the destruction or near-destruction of historical monuments and even of the natural environment. Some approaches are needed to be conducted, such as forecasting the visitors’ number during the summit season, control the entrance and designing mechanisms to increase carrying capacity and improve the distribution system. Then, the sustainability of tourism depends on the ability to anticipate the needs of the future visitors, management of the “tourist presence”, seeking the best tourists (Cooper et al.,

1998; Mihalic, 2000; Ryan, 2002) are also important in the Summer Palace. The visitors' psychology and behavior, such as diverting the public, motivating the visitors select rationally the visiting time; abide by the rules of management and possess the protection conscience or controlling social capacities of tourists in the historical monuments. Finally invest in environmental protection and restoration in the historical monuments, and other managerial and man-made actions, for instance using new technologies to avoid and try to solve the problems.

It is important to consider the limitations of this study. Even though a preliminary study is carried on, the samples and the collected data are very limited, so the result was not so completely and holistically. It is difficult to give a scientific and exact description of the problems that the Summer Palace meets in daily management. In research the practical problems are lack of the record of the number of the visitors in the pop season and lack of the primary information of the visitors who visited the Summer Palace in the crowded state. An extended research needs an effective and efficient structure and model to support, especially an advanced analysis measures. And the measures of control the number of the visitors should be studied in the future.

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# ALLEVIATING POVERTY VIA COMMUNITY BASED TOURISM: A CASE STUDY OF THE KELABIT COMMUNITY IN BARIO, SARAWAK

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## ABSTRACT

In the wake of globalisation and economic restructuring, many nations and communities are struggling to redefine and rebuild their economies without impacting the equilibrium of sustainability. Hence, this paper analyses how a small indigenous community, the Kelabits in the interiors of Sarawak, bordering Kalimantan in Bario, have balanced the task of preserving all life on earth and at the same time controlled tourism development. Three main dimensions that are analysed for sustainable and responsible community based tourism (CBT) at Bario include the: (i) Economic Responsibility; (ii) Socio-Cultural Responsibility; and (iii) Environmental Responsibility. Findings from the Bario experience have shown that CBT have a positive relationship with poverty alleviation by enhancing the economic level, improving the socio-cultural aspects, and preserving the environmental conditions.

**Key Words:** community-based tourism, responsible tourism, sustainability, indigenous community, Bario, Kelabits

## INTRODUCTION

The topic of environmental sustainability hit the headlines lately following the failure of the two summits at Copenhagen in late last 2009 and at Cancun in 2010. The theme of World Environment Day (WED) 2010 echoes the urgent call to conserve the diversity of life on the planet. As outlined by United Nations Environment Programme (UNEP), the present approach in tourism development have caused the clearing of much of the original forest, drained half of the world's wetlands, depleted three quarters of all fish stocks, and emitted enough heat trapping gases to keep the planet warm for centuries to come. In this process, many indigenous communities have lost their habitat due to intense development catering for mass tourism (Pleumarom, 1996). Hence, many of these indigenous communities are living in poverty as they lose their livelihood. One of the options to assist these communities is introduce tourism in this rural setting. Once such way is through Community Based Tourism (CBT).

To understand how CBT, or any kind of tourism, can impact on poverty, it is important to have a clear notion of what poverty truly is. A person is considered poor if that person's level of consumption or income is not enough to meet the basic needs. However, poverty encapsulates much more than just the economic status of a person or community. The World Bank (2009) defined poverty as follows:

*"Poverty is hunger. Poverty is lack of shelter. Poverty is being sick and not being able to see a doctor. Poverty is not having access to school and not knowing how to read. Poverty is not having a job, is fear for the future, living one day at a time. Poverty is losing a child to illness brought about by unclean water. Poverty is powerlessness, lack of representation and freedom."*

In addition, social indicators too can be used to measure poverty. Some of these indicators include access to basic education, health, services and infrastructure; factors of risks, vulnerability and exclusion.

Tourism being the second largest industry in Malaysia can play an important role to alleviate poverty among the indigenous community that has resources to promote tourism. Since its conception in Malaysia, tourism has had an impact on all people and all locations that it has touched. Tourism generates many economic benefits as it enabled the maintenance of community infrastructure, both public and private. However, government-led mass tourism has been putting too much emphasis on maximising profits with little or no development of communities and the protection of the environment especially in ecotourism or community based destinations.

Thus, as tourism development expands so does the potential harm on the indigenous communities and the environment of the touristic areas. Hence, some researchers have called for greater public involvement (Pigram,

1990 cited in Hing, 1997) and intensify research-based, medium sized, integrated and controlled tourism involving local participation (Singh, 1991 cited in Hing, 1997).

### **Empowering the community through Community Based Tourism (CBT)**

Community Based Tourism (CBT) is a community development concept that strengthens the ability of rural communities to manage their resources while ensuring the local community's participation. CBT can help the local community in generating income, diversifying the local economy, preserving culture, conserving the environment and providing educational opportunities. As such, CBT becomes a tool that can lead to the reduction of poverty (Hamzah & Khalifah, 2009) and increase in empowerment (Nair & Azmi, 2008). Initially, CBT projects are small in scale and are operated by the community itself with the help of outsiders such as private companies or Non-Governmental Organizations.

Today, CBT enables a cross-cultural experience as they give the opportunity to travellers to spend time in local communities and learn about their way of life, their environment and their culture. The financial benefits resulting from CBT should equally be shared among the participants whose common goal is their community's development and cultural and heritage preservation. It is vital that the community members should feel involved in every aspect of the project for it to be developed successfully. CBT also aims to provide educational opportunities, to conserve the environment, promote community pride and improve the community's quality of life in general (The Global Human Rights Education Network, 2009).

### **Socio-economic and environmental growth through sustainable tourism**

Sustainable tourism can be associated to CBT as they share the same goal - that of supporting the improvement of human living conditions through economic growth that promotes the protection and preservation of natural resources upon which both the present and future generations rely (The Global Development Research Venter, 2005 cited in The Global Human Rights Education Network, 2009).

The aim of Sustainable Tourism is thus to respect the socio-cultural authenticity of host communities, provide fair socio-economic benefits to all participants, ensure viable long-term economic operations and make optimal use of environmental resources while conserving them. It also aims to offer employment opportunities and social services to communities (Sustainable Development of Tourism Conceptual Definition, WTO, 2004, cited in the Global Human Rights Education Network, 2009). This form of tourism also heeds the participation of all stakeholders to ensure consensus building and ensure that those who are affected by the changes can voice their opinion about these changes. According to the Global Human Rights Education Network (2009):

*“Indigenous people have the right to define their own priorities regarding development that affects their lives, beliefs, institutions, spiritual well-being and lands. Indigenous people have the right to maintain control over their own social and economic development. Indigenous people have the right to participate and offer input to national and regional development plans that affect them. Indigenous people have the right to government study of the impact of development plans on indigenous culture before the implementation of such projects. Indigenous people have the right to protection of their natural environment.”*

It is impossible when developing sustainable tourism, to separate the people's well-being from the earth's well-being. Rodger (2005), asserted that poverty is a major cause of environmental degradation and that the environment can greatly benefit from economic growth, as economic growth is a key to poverty reduction. When the insecurity of poverty is no longer hovering over a community, the community can think more in a long-term perspective on how best to use their surroundings.

Therefore, there should be a greater implementation of sustainable CBT projects especially with today's increasing concern for the environment, for the empowerment of indigenous people and with the rise in the concept of eco-tourism and responsible tourism (McCool, 1994 cited in Hing, 1997).

### **Aim of Study**

Hence, the research will aim to achieve the following objectives:

1. To study the effectiveness of the current CBT projects in Bario, Sarawak in addressing the dimensions of poverty.
2. To understand the perception of the local community of developing CBT to alleviate poverty.
3. To propose a more effective development of CBT projects that is sustainable.
4. To develop a conceptual model that looks at the various dimensions of sustainability that can alleviate poverty using CBT.

Hence, this research will also analyze the benefits of CBT in the Kelabit Community. It has been proven that CBT plays a beneficial role on the economic growth of a community (Keane *et al.*, 2009), on the education

(Nicanor, 2001) and on health infrastructures (Scheyvens, 2002b). It also benefits the sustainability of the environment (Sheyvens, 2002a) and the overall empowering of the community especially when the community is involved (Rodger, 2005). This project will see whether all these benefits of a CBT affect the overall poverty of the Kelabit community.

## **METHODOLOGY**

This study was conducted through a qualitative research approach with in-depth interviews of 12 local people (homestay owners, guides, senior community members, the youths, etc.), the longhouse headman and of the various actors of tourism collaborating with the Kelabit community in Bario. Each interview took between 60 to 90 minutes. The following 14 questions were probed in-depth for each responded:

### **Economic Aspects**

1. What is the dominant industry that the community depends on economically and why?
2. If you have a business, did you get funds from CBT project to start your business?
3. How has CBT given the local more job opportunities?
4. Elaborate how your level of income has increased/decreased with your involvement in CBT?
5. How has your lifestyle improved with CBT?

### **Social Aspects**

6. How has the vocational training organised by the governmental or non-governmental organisations benefited the local community.
7. How good is the educational level in Bario?
8. Is the Kelabit Highlands a safe area for tourist? Why?
9. What kinds of cooperation exist between the locals and the tour operators and the locals and the government?
10. How has CBT enabled the preservation of the cultures in Bario?

### **Environmental Aspects**

11. What are your major environmental concerns in Bario?
12. What steps are being taken for the protection of the environment?
13. Will tourism result in the environment in Bario further damaging?
14. What can the local community do to protect the pristine environment of Bario?

A qualitative research approach enables to obtain an in-depth knowledge and understanding of the community, its functioning, and of the current CBT projects that are being undertaken in Bario. The key reasons of the successes and the failures of the CBT are better understood. A qualitative research also enables one to grasp better the current expectations of the community from a sustainable CBT project and the community's needs and priorities. Finally, a qualitative research can create a better understanding of what needs to be changed, managed and marketed effectively, as a CBT project in order to attain the set goal of poverty alleviation and empowerment of the community.

### **The Kelabit Community in Bario**

The Kelabit Community is located in Bario on the Kelabit Highlands, in the northeast corner of the Malaysian State of Sarawak, on the island of Borneo (see Figure 1). There are no proper roads or navigable rivers linking Bario to communities outside the Kelabit Highlands. However, Bario is serviced daily by Malaysian Airline flights via their twin-otter from Miri and Marudi. Bario lacks constant supply of basic utilities and they have to incur high cost for their basic needs due to the cost of freight. Although many of the community's children go to school, they have to leave home at early dawn to boarding schools outside the village (Bala, 2007). According to the World Bank definition of 2009, the Kelabit community is considered poor. A CBT project in Bario, Sarawak can alleviate poverty by addressing the basic dimensions of poverty namely income, health, education and security which will in turn lead to the empowerment of the community.

Bario lack constant supply of basic utilities. Besides the limited network coverage, water supply is through gravity-fed system and thus they rely on rainwater and river water for their constant supply. Limited electricity supply is provided through diesel generators and solar-panels. Nonetheless, Bario has potential to become a truly responsible ecotourism destination that emphasizes community-based tourism (CBT). Over the years, many research (Jiwan *et al.*, 2008; Roger, 2005) has been conducted to analyse the potential of Bario to attract ecotourist to this highland.

Figure 1  
Location of Bario



## RESULTS AND DISCUSSION

Normally qualitative work is described as starting from an inductive position, seeking to build up theory, with the conceptual framework being 'emergent', because existing literature/theories might mislead. The conceptual framework for this study was inspired by the World Bank's (2009) definition of poverty - that is poverty is lack of money, education, health; poverty is unemployment and vulnerability.

The dimension of the framework, which includes the economic aspects, was inspired by Keane, *et al.* (2009) and Braman and Acción (2001) who all mention the importance of better infrastructure and the need for the host community to have access to more employment opportunities.

The second dimension, the social aspects, concerns the need for education as evoked once again by Braman and Acción (2001) and by Jackson (2006). It includes the need to improve of the health system and access to medication as underlined by Scheyvens (2002 b). The security aspect of the social dimension of the framework was inspired by the vulnerability of a poor community as suggested in the definition of the World Bank. The framework also comprises the environmental dimension of poverty alleviation as advocated by Sanggin (2009).

In general, the findings from the Bario experience have shown that a balanced and sustainable tourism development can be achievable by ensuring the adherence of two phases of the development:

- a. Phase 1 – Developing CBT
  - Assess community needs and readiness for development.
  - Educate and prepare the community for development.
  - Identify and establish leadership/local champion.
  - Prepare and develop community organization.
- b. Phase 2: Sustaining CBT
  - Develop partnerships.
  - Adopt an integrated approach.
  - Plan and design quality mini projects that will benefit the community.
  - Identify market and develop marketing strategy that will get others to assist.
  - Implement and monitor performance.

The following conceptual framework (see Figure 2) was developed from the in-depth qualitative study. Five (5) main hypotheses that were developed based on the series of qualitative analysis include:

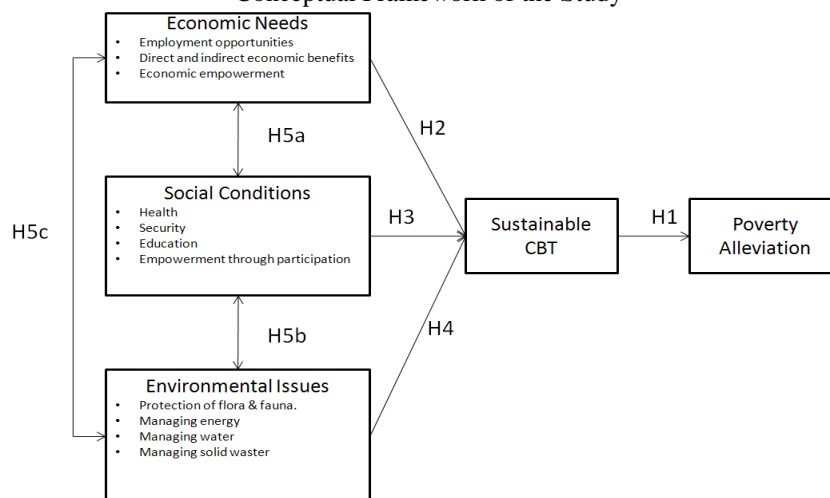
- a. H1: Sustainable CBT have a positive relationship with poverty alleviation: Sustainable CBT projects will result in poverty alleviation and empower the community.
- b. H2: Sustainable CBT enhances the economic level of the community: CBT projects create new job opportunities which result in tangible benefits for the community, such as an increase of household income and thus improvement of household consumption, as proven in the study of Keane *et al.* (2009). CBT projects offer training and skills that lead to qualifications that in turn lead to better job opportunities (Braman, 2001; Nicanor, 2001). Indirect economic benefits also result from CBT projects, such as an upgrading of infrastructures (roads, schools, hospitals) and technology as shown in the studies of Scheyvens (2002b).
- c. H3: Sustainable CBT improves the social aspects of the community: CBT projects give the possibility of improving the structures and cleanliness of the hospitals, leading to more hygienic and spacious health posts. It is assumed that the increase of the household income will have a positive impact on the



household's diet and thus on health. Education will also benefit the community. School attendance can be improved with the availability of hostels and bus to pick students up. Attendance at schools should lead to a better sense of security because youth will have less time for undesirable activities at night-time. What is more, schools will create activities which will appeal to the youth (Keane *et al.*, 2009). For a CBT to be beneficial on the long-term, it is vital to cooperate with the locals. The inhabitants must be involved for a CBT to function and achieve its purpose as explained by Rodger (2005) or Sanggin (2009).

- d. H1: Sustainable CBT have a positive relationship with poverty alleviation: Sustainable CBT projects will result in poverty alleviation and empower the community.
- e. H2: Sustainable CBT enhances the economic level of the community: CBT projects create new job opportunities which result in tangible benefits for the community, such as an increase of household income and thus improvement of household consumption, as proven in the study of Keane *et al.* (2009). CBT projects offer training and skills that lead to qualifications that in turn lead to better job opportunities (Braman, 2001; Nicanor, 2001). Indirect economic benefits also result from CBT projects, such as an upgrading of infrastructures (roads, schools, hospitals) and technology as shown in the studies of Scheyvens (2002b).
- f. H3: Sustainable CBT improves the social aspects of the community: CBT projects give the possibility of improving the structures and cleanliness of the hospitals, leading to more hygienic and spacious health posts. It is assumed that the increase of the household income will have a positive impact on the household's diet and thus on health. Education will also benefit the community. School attendance can be improved with the availability of hostels and bus to pick students up. Attendance at schools should lead to a better sense of security because youth will have less time for undesirable activities at night-time. What is more, schools will create activities which will appeal to the youth (Keane *et al.*, 2009). For a CBT to be beneficial on the long-term, it is vital to cooperate with the locals. The inhabitants must be involved for a CBT to function and achieve its purpose as explained by Rodger (2005) or Sanggin (2009).
- g. H4: Sustainable CBT benefits the environment conditions within the community: Poverty is a major cause of environmental degradation (Rodger, 2005). CBT will educate the community on the preservation of the area (Jackson, 1996). Responsible tourists play an important role in the conservation of the biodiversity in ecotourism destinations. Indeed, the visitor's respect for the biodiversity of the community and his/her willingness to travel vast distances in order to experience the community's natural wonders enhance the locals' appreciation of their natural resources (Scheyvens, 2002) and they become more vigilant in the preservation of their surroundings. A sustainable environment can be achieved if the local community is made aware of the importance of protecting the flora and fauna and also managing the energy, water and solid waste efficiently.
- h. H5: There is a relationship between the economic needs, the social conditions and the environment issues with each other: It is impossible to consider one without considering another. These three dimensions impact on each other: an economic increase will lead to an increase in health and education, which will in turn reduce the crime rate and inequalities and finally be beneficial for the environment. It is only by addressing each and every one of these issues together that a CBT project can hope to eradicate poverty and empower the community (Keane *et al.*, 2009).

Figure 2  
Conceptual Framework of the Study



Indeed, Barrio has all the ingredients to be truly a successful CBT destination. The physical resources (flora and fauna), the people, the rich culture, and the accessibility (see Figure 3), will all make Barrio a truly authentic and responsible destination.

Hence, the three main areas of sustainable development that can be enhanced in Bario include:

- a. **Economic Aspect:** Bario has tremendous potential to develop and sustain their homestay to give tourist the true experience. The current management of homestay can be improved further with proper guidance and structure.
- b. **Socio-Cultural Aspect:** The rich culture of the Kelabits can be preserved by documenting them and making it available to all visitors. The younger generations will be involved in all the social events. Thus, the older generation can pass their know-how to these younger Kelabits who will then be proud to show it to the tourist. Hence, this will avoid the culture from dying.
- c. **Environmental Aspect:** The current remote and rural setting in Bario is great but the environment is not 100% visitor friendly. Due to the lack of constant electricity, water and telecommunication facilities, the location may not attract many holiday seekers. Only the “hardcore” ecotourist will enjoy the destination. Thus, the community needs to sort out clean water supply, adequate toilet facilities, efficient solid waste disposal, extensive usage of solar panels (and wind mills). Getting the road tarred/cemented for easy transportation (i.e. rental of bicycle, motorbike, jeep, etc.) and walking/trekking, will further make Bario and destination for the “hardcore” and “not so hardcore” ecotourist.

Figure 3

Bario, a truly Authentic Ecotourism Destinations



a. Welcoming reception for all tourist at the Bario airport.

b. The Penan aborigines living in harmony with the Kelabits

c. Bario rice is one of the main products of Bario.



d. Rich cultures of Bario.



e. Jungle trekking and survival is one of the main activities in Bario



f. The Kelabit Gastronomy

**CONCLUSION**

In conclusion, it must be understood that sustainability is not like a project that can be completed at a certain point in time. Rather, it is an ongoing balancing act and at the heart of the issue are assumptions about the requirements of future generations and how we expect these requirements to be satisfied. This project analyzed how beneficial is CBT for the community. It also discovered the efficiency of a CBT project, and offer means to improve them. CBT strengthens the ability of rural communities to manage their resources while ensuring the local community’s participation. CBT can help the local community in generating income, diversifying the local economy, preserving culture, conserving the environment and providing educational opportunities.

The findings showed that for tangible benefits to reach the whole community, cooperation should be fully developed. This cooperation include among the homestay operators, tour operators, government and the local community. Only then, the CBT project can alleviate poverty in Bario. Thus, it is recommended that to diversity the homestay and to create more employment, both ecotourism and agrotourism activities can be included in the programme. Vocational trainings need to be given to the local community to develop their capacity to better manage CBT programmes. The local community should also be involved in more actively in the promotion and decision-making. Subsequently, in the long term, the community can uplift themselves if the CBT programme are well managed and sustainable.

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# ENERGY AND CARBON LITERACY MODEL OF HOTEL EMPLOYEES IN TAIWAN

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## ABSTRACT

This study assesses energy and carbon literacy of hotel employees and examines the relationships among the key elements of the energy and carbon literacy model (ECLM). A questionnaire survey was conducted to collect data from a sample of employees in 19 international tourist and tourist hotels in Taiwan. The Energy and Carbon Literacy Scale was used as a measure to assess employee energy and carbon literacy. In total, 555 valid questionnaires were obtained with a response rate of 82.2%. The findings revealed that hotel employees generally exhibit a high level of energy and carbon literacy. Positive correlations among the dimensions indicated that employees with better energy conservation and carbon reduction (ECCR) knowledge would demonstrate more positive ECCR attitude and behavior. In ECLM, ECCR knowledge demonstrates a significant impact on ECCR behavior, not directly, but mediated by ECCR attitude. This suggests that developing positive attitude toward ECCR is the key factor driving employee performing ECCR behavior.

**Key Words:** Energy and carbon literacy; Energy conservation; Carbon reduction; Hotel industry

## INTRODUCTION

The growth of average global temperature is predominantly due to the increase in global greenhouse gas (GHG) concentrations generated by human activities and fossil fuel use (IPCC, 2007). Although the hotel industry is usually regarded as a smokeless sector, it actually creates a considerable impact on the natural environment (Kasim, 2007). As an important member of the travel and tourism sector, hotel itself is not only one of the most energy consuming buildings (Wu, Rajagopalan, & Lee, 2010), but also one of the largest polluters and natural resource consumers in the service industry (Kasim, 2007). To reduce to the negative impact of the environment, hotel operators should take the initiative to implement energy conservation and carbon reduction (ECCR) strategies in the daily operations. ECCR is defined as the efforts which mitigate GHG effect and threats to the environment by saving energy and reducing carbon emissions. The success of a "green" business strategy primarily depends on corporate employees, who are the real executors of green practices, especially in the labor-intensive hotel industry (Sloan et al., 2009). Similarly, the success of hotel ECCR implementation relies on staff knowledge, attitudes, and behavior of ECCR. That is, assessing and understanding employee energy and carbon literacy are key to improve employee ECCR knowledge, attitudes, and behavior in terms of hotel ECCR effectiveness. Literacy refers to individuals not only understand a particular and relevant body of knowledge, but also have the ability and the willingness to use that knowledge in a functional manner (Dewaters, Powers, & Graham, 2007). More importantly, the fundamental concept of literacy focuses on individual transformation through behavioral changes (Clair, 2003). However, little research focuses on investigating hotel staff in terms of energy and carbon literacy and how the key components in ECLM are correlated. This may cause a lack of understanding the mechanism existing in ECLM to enhance staff commitment and performance of ECCR implementation.

According to the literature, knowledge, attitude, and behavior are deemed as the most critical dimensions of environmental and energy literacy (e.g., Hungerford & Tomera, 1985; Roth, 1992; DeWaters et al., 2007). Inferring from both environmental and energy literacy, individuals are considered exhibiting positive ECCR attitudes and behavior when they have correct ECCR knowledge. Many studies, however, present contradictory findings and indicate that environmental knowledge appears to be influential on behavior not directly, but mediated by environmental attitudes (e.g., Alp et al., 2006). To clarify the above arguments, this study also intends to examine the mediating effect of ECCR attitudes on the relationship between ECCR knowledge and behavior. Accordingly, two purposes of this study are as follows: (1) To assess and understand energy and carbon literacy of hotel employees by identifying critical components of ECLM for the hotel industry; (2) To examine the effects and the relationships existing in various components of ECLM. This study can provide useful insights into human resource management and personnel training in terms of energy and carbon literacy and can further increase hotel ECCR effectiveness and competitive advantages.

## **LITERATURE REVIEW**

The components and the relationships of ECLM can be identified through investigating and understanding the critical factors of environmental and energy literacy. Hungerford and Tomera (1985) developed environmental model that incorporates eight components of environmental literacy, including knowledge of issues, beliefs, values, attitudes, locus of control, sensitivity, environmental action strategies and ecological concepts. Roth (1992) identified six variables for environmental literacy, including environmental sensitivity, knowledge, skills, attitudes and values, personal investment and responsibility, and active involvement. These variables are categorized into four dimensions that include knowledge, skills, affects, and behavior. Additionally, energy literacy is identified containing cognitive domains (consisting of knowledge, understanding, and skills of energy), affective domains (consisting of sensitivity and attitudes towards energy issue) and behavioral domains (consisting of behavioral intentions, involvement, and actions to energy conservation) (DeWaters et al., 2007). Consequently, both environmental literacy and energy literacy are multi-dimensional constructs that include not only the cognitive level but also concern about how individuals think, act, and feel in a certain way. Following the same vein, ECLM can be recognized by the three main dimensions of knowledge, attitude, and behavior. That is, hotel employees with high energy and carbon literacy should have extensive ECCR knowledge, concern with ECCR related issues, have positive ECCR attitudes, have the willingness and actually perform ECCR behavior at work. Furthermore, seven variables underlying the three dimensions of ECLM are identified as knowledge of ECCR, the ecological concept, attitudes and values, sensitivity, locus of control, behavior intentions, and actual ECCR actions.

Previous studies indicated that the three main dimensions of knowledge, attitude, and behavior are significantly correlated to each other. For instance, Hsu and Roth (1996) found a positive correlation between environmental knowledge and attitudes. An individual's environmental attitudes, affects, and values are found positively associated with the sense of environmental responsibility and responsible environmental behavior (Tuncer et al., 2009). Moreover, possessing correct environmental knowledge can assist an individual behave appropriately and resolve environmental problems (Yilmaz & Andersen, 2004; Abdul-Wahab, 2008). Accordingly, it is assumed that ECCR knowledge has positive effects on both the ECCR attitude and behavior, in that the ECCR attitude is identified having a positive effect on ECCR behavior. However, the relationships between knowledge, attitude, and behavior are inconsistent. Previous research argues that people who have more environmental knowledge will not necessarily lead to a higher level of environmental behavior, suggesting that the casual relationship between environmental knowledge and behavior is not supported (Tikka, Kuitunen, & Tynys, 2000; DeChano, 2006). Many studies show that environmental knowledge has to transform and generate environmental behavior through environmental attitudes (Hungerford & Volk, 1990; Alp et al., 2006). Based on the assumptions inferred from the related studies, in ECLM, this study intends to examine the mediating effects of ECCR attitudes (including variables of attitudes and values, sensitivity, locus of control) on the relationship between ECCR knowledge (including variables of ECCR knowledge and ecological concept) and ECCR behavior (including variables of behavioral intentions and actual ECCR actions).

## **METHOD**

### **Sample**

The data were collected from a sample of hotel employees who were employed at different departments of international tourist and tourist hotels in Taiwan. The participants were required to self-report their energy and carbon literacy via a questionnaire survey. Using purposive sampling, 675 questionnaires were mailed to 19 international tourist and tourist hotels and 555 questionnaires were returned, with a response rate of 82.2%.

### **Instrument**

This study used Energy and Carbon Literacy Scale for the Tourism and Hospitality Industry developed from a national research project sponsored by Taiwan’s National Science Council. A seven-point Likert-type scale was used to measure employee energy and carbon literacy. This scale contained a total of 37 items, including 5 items of ECCR knowledge, 6 items of the ecological concept, 5 items of attitudes and values, 3 items of sensitivity, 6 items of locus of control, 6 items of behavioral intentions, and 6 items of ECCR actions. In addition, social desirability scale by Strahan and Gerbasi (1972) was used to delete invalid questionnaires. Participants’ personal information including gender, age, educational level, job position, and the hotel type were also collected for the data analysis.

#### Data analysis

This study used descriptive statistics to analyze participants’ personal information and their degree of energy and carbon literacy. Exploratory factor analysis (EFA) was used to validate the constructs of the scale. The EFA results indicated that an item of attitudes and values, and an item of ECCR actions were deleted due to factor loadings lower than .4. The Cronbach  $\alpha$  values of the Energy and Carbon Literacy Scale and its subscales are all above .82, suggesting that the measures have a good internal consistency. Hierarchical regression analysis was then applied to assess the mediating effects in this study.

## RESULTS

#### Personal information

To obtain the valid data, this study first removed the sample which social desirability score is greater than 8. Afterwards, a total of 432 valid questionnaires were obtained in this study. The analytical results revealed that more than half of the respondents (68.5%) are female. Nearly half of the respondents are 21-30 years old (50.9%) and university graduated (50.7%). A majority of respondents (72.9%) are the basic level of staff and 52.3% of respondents work for 1-5 years in the same hotel. Thirty-one percents of respondents are at the rooms division, and 25.5% are at the food and beverage department. Respondents who work at a hotel chain and the room number within 201-400 both accounted for 37% of respondents.

#### Energy and carbon literacy of hotel employees

The analytical results show that the average score of ECCR knowledge, attitude and behavior of hotel employees are all greater than 5 (see Table 1), indicating that the participants have the high degree of energy and carbon literacy needed in the hospitality industry. Among the dimensions, the score of ECCR attitude is the highest ( $M=5.32$ ), following the ECCR behavior ( $M=5.25$ ), and the ECCR knowledge ( $M=5.03$ ).

Table 1 Means of ECCR dimensions of ECLM

Dimensions	M	SD
Knowledge	5.03	.826
Attitude	5.32	.771
Behavior	5.25	.834
<i>Average</i>	<i>5.21</i>	<i>.684</i>

\*Measures: seven-point Likert-type scales

The mediating effect of ECCR attitude on the relationship between ECCR knowledge and ECCR behavior Before employing hierarchical regressions, intercorrelations of ECCR dimensions have to be examined to ensure the significant correlations existed in every two ECCR dimensions. Table 2 reveals that there are significant positive correlations between the three dimensions.

Table 2 Intercorrelations of ECCR dimensions

Dimensions	Knowledge	Attitude	Behavior
Knowledge	1		
Attitude	.604**	1	
Behavior	.386**	.717**	1

To assess the mediating effect, three sets of simultaneous multiple regression equations were used. The results of hierarchical regression are summarized in Table 3. As seen in Model 1, six demographic variables as control variables were used to rule out the extraneous effects. In Model 2, the effect of “ecological concept” underlying the ECCR knowledge dimension was found to exert a significant impact on ECCR behavior. Model 3 showed

significant effects of “attitudes and values”, “sensitivity”, and “locus of control” underlying the ECCR attitude dimension on ECCR behavior, with the amount of explanation 48.8% and the incremental amount of explanation 30.3%. However, in Model 3 the effects of “ecological concept” and “ECCR knowledge” on ECCR behavior showed relatively low coefficient value. That is, the influences of “ecological concept” and “ECCR knowledge” on ECCR behavior were a lot less when the mediators (attitudes and values, sensitivity, and locus of control) were included in the model. This indicates that the three variables of the ECCR attitude are complete mediators.

Table 3 The ECCR knowledge and attitude as predictors of ECCR behavior

		Model 1	Model 2	Model 3	
<i>Step1</i>					
Control variables	Gender	.019	.055	-.007	
	Education level	-.071	-.086	-.067	
	Position	.149	.145	.042	
	Hotel type	-.115	-.084	-.013	
	Operations type	.148	.141	.071	
	Room number	-.033	-.045	-.031	
<i>Step2</i>					
Knowledge	ECCR knowledge		.061	-.081	
	Ecological concept		.340*	-.030	
<i>Step3</i>					
Attitude	Attitudes and values			.285*	
	Sensitivity			.271*	
	Locus of control			.316*	
		R <sup>2</sup>	.067	.185	.488
		Δ R <sup>2</sup>	.067	.118	.303
		F	3.13*	7.39*	22.27*
		Δ F	3.13*	18.89*	50.62*

\*Dependent variable: ECCR behavior

## CONCLUSION

This study evaluates energy and carbon literacy of hotel employees and further clarifies the casual relationships among ECCR knowledge, attitude, and behavior in ECLM. Overall, hotel employees in Taiwan demonstrate a high level of energy and carbon literacy that benefits hotel ECCR performance. However, the relatively insufficient ECCR knowledge of hotel employees highlights the need of ECCR knowledge education that hotels should provide. Since employees with more ECCR knowledge will demonstrate more positive ECCR attitudes that will directly lead to positive ECCR behavior. Hotel managers not only should enhance employee ECCR knowledge, but also must enhance employee sensitivity, positive attitudes and values towards ECCR to increase their confidence on behavioral changes. For hotel HR managers, a formal ECCR education and training programs are suitable for all staff obtaining correct ECCR knowledge and skills to apply to the workplace and improve the ECCR effectiveness. Additionally, top management commitment, incentive programs, and a good communication with hotel staff regarding corporate ECCR achievements and strategies can increase staff's awareness and motivations to involve in ECCR actions. The most important and challenging task to achieve the hotel ECCR target is how to change staff mindset and attitudes to enhance their behavioral intentions and transform to actual hotel ECCR behavior.

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## REPORTING CORPORATE SOCIAL RESPONSIBILITY EFFORTS: THE CASE OF TURKISH AIRLINES

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### ABSTRACT

This study looks at how Turkish Airlines reports its corporate social responsibility (CSR) efforts. Based on a literature review, a theoretical framework was developed, which had six main areas: vision, safety, environment, community, marketplace, and workforce. Turkish Airlines was chosen as a case study given its rapid growth and success in recent years. Official company website, reports and magazine articles were content analyzed. The findings reveal that Turkish Airlines reports mostly on their safety, environmental and ethical efforts. Although the carrier does not provide a separate CSR report, the research findings indicate that, compared to previous years, Turkish Airlines has a growing awareness and reporting pattern of its CSR activities.

**Key Words:** Corporate social responsibility, Turkish Airlines, aviation, air transportation.

### INTRODUCTION

The global airline industry has grown rapidly for the last three decades. Airlines carry over 2.2 billion passengers annually, and generate a total of \$3,560 billion and 32 million jobs globally (ATAG, 2010). However, this industry has negative impacts on the environment including air pollution and noise. Although new generation aircrafts are 70% more fuel-efficient than their predecessors, the airline industry creates 2% of man-made CO<sub>2</sub> emissions (ATAG, 2010; ICAO, 2010; IPPC, 2007). Considering an approximate annual 5% traffic growth (Airbus 2010; Boeing, 2010), it is obvious that this industry needs to not only reduce its negative impacts but also demonstrate social responsibility activities (Tsai and Hsu, 2008). Although CSR is one of the emerging subjects in the airline industry, there is still limited research on CRS activities of airlines (Cowper-Smith and DeGrosboi, 2011). In recent years, Turkish Airlines has demonstrated a rapid growth. It has achieved 11% passenger traffic growth and is now ranked as the 4<sup>th</sup> largest airline in Europe (AEA, 2009). However, no previous study has looked at this company's CSR efforts. Given this, the purpose of this study is to look at how Turkish Airlines report its CSR efforts.

### CORPORATE SOCIAL RESPONSIBILITY AND CSR REPORTING

Gray et al. (1996, p. 3) define CSR as “the process of communicating the social and environmental effects of organizations’ economic actions to particular interest groups within society and to society at large”. The difficulty of measuring CSR is evidenced by the lack of reliable CSR scales available in the literature. CSR efforts are often measured through indices, content analysis of reporting, managerial perceptions, reputation indices, databases, and case studies (Wolfe and Aupperle, 1991). It is accepted that companies can be at various levels in relation to their CSR reporting. A company may be considered lagging if it has limited CSR reporting, whereas a company can be considered as “the leading edge” if its CSR reporting is aligned with the business strategy, uses multiple media formats (Little, 2005). Although it is not legally required, many companies provide their CSR reports either in hard copy or online (Cho et al, 2009; Deegan, 2002; Holcomb, Okumus and Bilgihan, 2010). Various reasons exist in relation to why companies report their CSR initiatives. These include

the right thing to do, to improve company image (Jenkins, 2004). Socially responsible investing (SRI) is one of the main reasons that companies report their CSR initiatives. Reporting of CSR initiatives provides information for investors in determining their investment choices. Corporate image is also seen as one of the leading motives of CSR reporting (Nik and Sulaiman, 2004).

Hooper and Greenall (2005) examined environmental reporting of 272 International Air Transport Association Airlines (IATA) and their findings demonstrate that comparing social and environmental performance of different airlines is not easy due to lack of enough comparable data. Mak and Chan (2006) looked at the environmental reporting practices in the Asia Pacific airline sector. Their findings indicated that only five airlines out of 23 airlines published standalone environmental reports. Mak and Chan (2007) also examined the environmental reports of three Japan based airlines and they have found that most of the environmental elements were mentioned in those reports. In another study, Mak, Chan, Wong and Zheng, (2007) compared environmental reporting performance of 14 airlines in Europe and Asia and found varying degrees of effort and resources to producing such reports. Their study findings indicated that the European airlines' environmental reports were richer in content than those of their counterparts in Asia. In two studies dealing with Scandinavian Airlines as case studies, Lynes and Dredge (2006) examined environmental commitment and Lynes and Andrachuk (2008) examined motivations for corporate social and environmental responsibility. While results showed that values, culture, and beliefs generated both internally and externally have a critical impact on the airline's environmental policy-making; they also argued that there are differences between motivations for social and environmental responsibility among airlines.

Lee and Park (2010) investigated CSR activities and financial performance of airlines. This study found support for a positive and linear impact of CSR on value performance but not on accounting performance for airline companies. Tsai and Hsu (2008) developed a hybrid model for selection and costs assessment of different CSR programs as an example looking at China Airlines. Philips (2006) examined CSR practices and policies within the United States aviation industry with the focus of ethics and CSR education. Cowper-Smith and DeGrosboi (2011) conducted one of the latest and most detailed studies in airline CSR practices and have compared 41 airlines' CSR activities using a content analysis approach. Results of this study revealed that adoption of CSR reporting in the airline industry has been relatively slow. These reports mostly focused on environmental issues rather than on the social or economic dimensions of CSR. They reported 14 airlines out of 41 had annual CSR or environmental reports available online in English and low levels of reporting of CSR initiatives among these airlines.

To sum up, although the above studies are somewhat exploratory in nature, they can be seen as initial attempts to determine where the airline industry stands with CSR activities and reporting. The broad conclusion from the literature is that performing in a socially responsible manner has received increased awareness over the past decade. Based on our literature review, a theoretical framework has been developed based on an in-depth literature review on CSR activities. Our literature review focused on both CSR literature in general (Alnajjar, 2000; Bewley and Li, 2000; Bohdanowicz and Zientara, 2008; Cho, Phillips, Hageman and Patten, 2009; Holcomb, Okumus and Bilgihan, 2010; Holcomb, Upchurch and Okumus, 2007; Welford, 2005) and also in the airline industry (Cowper-Smith and DeGrosboi, 2011; Lynes and Andrachuk, 2008; Mak and Chan, 2007; Philips, 2006; Tsai and Hsu, 2008). The theoretical framework had six main areas: vision, safety (including security), environment, community, marketplace, and workforce. Each of the above areas has several sub-groupings listed in Table 1 for further analysis.

## **METHODOLOGY**

Turkish Airlines was chosen as a case study given its rapid growth and success in the aviation industry globally. It is known that case studies can help researchers find answers for their what, why, and how questions (Yin, 2003). Content analysis method was employed to study the CSR activities of Turkish Airlines. Turkish Airlines, Inc. Turkish Airlines is the flag carrier of Turkey based in Istanbul, Turkey. It was founded 20 May 1933 by the Turkish Government. Turkish Airlines served as a public enterprise in many years and in 1984 the airline became a profit oriented "State Economic Enterprise". The carrier was included within the scope of the privatization in September 1990 and an Initial Public Offering (IPO) of 1.8% of the equity was made. In December 2000, Turkish Airlines announced a major privatization program which permitted privatization of up to 51% of shares with a retaining Golden Share of the government. With the further two public offerings, which held by Turkish Privatization Administration, proportion of private shares increased first to 24.83% in November 2004 and then to 50.88% in May 2006 and THY's state airline status is ended (THY, A Brief History, 2011). The carrier became an official member of Star Alliance on April 1<sup>st</sup> 2008 (THY, A Brief History, 2011). Currently, the carrier operates a network of scheduled services which links over 39 domestic destinations and with nearly 128 worldwide destinations in Europe, Middle and Far East, North and South

Africa, the US and Canada. It ranks 4<sup>th</sup> in passenger market share, 5<sup>th</sup> in Available Seat Kilometer (ASK) and 6<sup>th</sup> in Revenue Passenger Kilometer (RPK) market share among AEA member airlines (THY, Presentations, 2010). In January-December 2010 total passenger number has increased by 16.0%, reaching to 29.1 million passengers from 25.1 million passengers for the same period of 2009 (THY, News, 2011). Temel Kotil, CEO of the carrier, stated that: ‘In the last five years we increased our flight network by 44%, our number of planes by 100% and our number of passengers by 116%’ (Kotil, 2009). The company employs over 10,000 people, has 155 aircrafts and is one of the youngest fleet of Europe (THY, 2010).

Neuman (2003:219) describes content analysis as “a technique for gathering and analyzing the content of text. The content refers to words, meanings, pictures, symbols, ideas, themes, or any message that can be communicated”. Although it is descriptive in nature, content analysis can provide emerging themes and trends (Henderson, 1991). For this purpose, official reports, magazine articles, and websites were searched to find Turkish Airlines’ CSR activities. Since the company has no official CSR Report; the data related with CSR activities gathered via downloadable files and web content of THY website and/or Google search results. In addition annual reports 2001-2009, presentations, and media releases, and SkyLife, the official magazine of THY, was also examined. SkyLife archive which can be accessible online between October 2005 and February 2011 was searched. By following the research framework, collected documents and materials were content analyzed separately by both researchers and the emerging themes and findings were compared and finalized.

Table 1 Main CSR Areas for Airlines

Vision and Values	<ul style="list-style-type: none"> <li>➤ Mission/vision statement</li> <li>➤ Code of conduct (ethics)</li> <li>➤ Board conducted CSR review</li> </ul>
Safety	<ul style="list-style-type: none"> <li>➤ Aviation safety</li> <li>➤ Workplace safety</li> <li>➤ Safety of customers</li> </ul>
Environment	<ul style="list-style-type: none"> <li>➤ Conservation (noise, emission, energy sources, fuel consumption)</li> <li>➤ Architectural integration (heritage)</li> </ul>
Community	<ul style="list-style-type: none"> <li>➤ Community support and charities</li> <li>➤ Employee volunteerism</li> <li>➤ Jobs for handicapped/disadvantaged</li> </ul>
Marketplace	<ul style="list-style-type: none"> <li>➤ Business partners and suppliers (other airlines, airports, ground handling agents, catering companies, etc)</li> <li>➤ Costumers</li> </ul>
Workforce	<ul style="list-style-type: none"> <li>➤ Employee diversity</li> <li>➤ Family services/employee welfare programs</li> <li>➤ Child care</li> </ul>

## FINDINGS

The research findings are presented under the following headings: vision, safety, environment, community, marketplace, and workforce.

### Vision and Values

The company's mission statement is noted as the following: "To become the preferred leading European air carrier with a global network of coverage thanks to its strict compliance with flight safety, reliability, product line, service quality and competitiveness, whilst maintaining its identity as the flag carrier of the Republic of Turkey in the civil air transportation industry" (THY, 2011). The company's vision statement is stated as the following:

"To become an air carrier with;

- a continued growth trend over industry average
- zero major accidents/crashes
- most envied service levels worldwide
- unit costs equating with low cost carriers
- sales and distribution costs below industry averages
- a personnel constantly developing their qualifications with the awareness of the close relationship between the benefits for the company and the added value that they contribute
- an entrepreneurship that creates business opportunities for fellow members in the Star Alliance and takes advantage of the business potential provided by them
- a staff well adapted to modern governance principles by observing the best interests of not only shareholders but also stakeholders." (THY, 2011).

There seems to be no direct emphasis on CSR activities in vision and mission statements of Turkish Airlines. Safety and quality service seem to be highlighted more. For example in 'Welcome Aboard' section of official magazine (Kotil, 2006) Kotil states that:

'Our highest goal throughout our 73 years in civil aviation transport has been to raise passenger satisfaction to the highest level while at the same time being a stickler for safety and quality.'

### Safety

In parallel with the importance of aviation safety, in Turkish Airlines' website and official reports, flight safety receives special attention. The Directorate of Flight Safety and Quality Assurance Department is responsible for compliance in Joint Aviation Authorities (JAA) regulations and Joint Aviation Regulations-Operations (JAR-OPS) and Turkish Airlines is qualified as an IOSA Operator after the IATA Operational Safety Audit as of April 07, 2006 (THY, A Brief History, 2011). Flight Safety is mentioned one of the first policy objectives of the company:

"Flight Safety is the first consideration of Turkish Airlines. Flight Safety within our scope of responsibility covers Flight Operations, Flight Training and Standards, Cabin, Maintenance Department, Ground Operations, Technical Training, Emergency Response Group and Flight/Maintenance/Ground Safety Management."

The research findings suggest that flight safety is a top priority for Turkish Airlines. In relation to this, the CEO of the company stated that "Turkish Airlines is also pursuing its successful efforts with regards to safety and security, both subjects to which we have been sensitive for years" (Kotil, 2006).

### Environment

Environment is one of the most emphasized areas in relation to Turkish Airlines' SR efforts. For example, in 2009 Annual Report it was stated that "Turkish Airlines' vision of sustainability is based on being a leading, global and respected institution that conducts itself in line with its responsibility towards environmental, economic and social development." The company's report's social responsibility section also states that:

"Turkish Airlines recognizes that older generation aircraft release higher carbon emissions, consume more fuel, and create more noise pollution, and it conducts itself with the awareness of its responsibility to the environment, operating a young fleet whose age is below the sector's average."

In the early 2008 a collaborative study on assessment of fuel saving areas was started with IATA Green Team. This Fuel Savings Project brought both financial and environmental good results to the airline: 120.205 ton fuel

savings and 378.648 tons emission reductions were achieved by Jan 2009 (THY, 2009) Relating to this project, the CEO of the company, Mr. Kotil stated that “We are working harder, and consuming less, for a greener environment” (Kotil, 2009). With such carbon reduction implementations, Turkish Airlines was expected the equivalent impact of planting one million trees. In the company’s annual reports since 2004, there has been a social responsibility section which provides same statement for the last years:

“The Company continued to operate by its service quality and social responsibility philosophy, keeping its leading position both in the country and abroad. No lawsuits have been filed against the Company in Turkey on the ground of causing environmental damage” (Turkish Airlines Annual Reports, 2004-2009).

### **Community**

The research findings indicated numerous initiatives related to community efforts. These include not only community efforts within Turkey but also globally. For example, Turkish Airlines signed a protocol with Turkish Red Crescent and promised to provide contributions to the disaster relief, blood donation, education, donation, and promotional activities. With this project contribution of healthy employees aged between 18 and 65 years old are encouraged to donate blood. Based on the slogan ‘No obstacles for the handicapped on Turkish Airlines’ and cooperation between the Company and the Turkish Handicapped Administration, which will provide training in how to provide better service for the handicapped people and 25% discount on its domestic and international routes of Turkish airlines (Skylife, 2007). Special 50% discount is offered all teachers in honor of Teachers Day on November 24. Transportation of relief supplies free of charge to Ethiopia and Kenya; aids to Pakistan and blood/blood supplies for the Red Crescent and for the Foundation for Children with Leukemia (LÖSEV). Another example is the transportation sponsorship for Turkish Radio and Television’s 29<sup>th</sup> International Children’s Festival. Turkish Airlines carried 300 children from 62 countries to Turkey for the festival. Finally, for the celebration of April 23, National Sovereignty Day and Children’s Day with the attendance of thirty children in the 7-12 age groups from an Orphanage, the Airline distributed a variety of gifts to the children and gave the opportunity to tour the new hangar and planes in the technical section.

The company sponsors many cultural and scientific events. Some of these events include 9<sup>th</sup> International Conference of the International Society for Third Sector Research (ISTR, 2010), International Conference on Environment: Survival and Sustainability, the International Council of Organizations for Folklore Festivals and Folk Art (CIOFF), the 6<sup>th</sup> and 7<sup>th</sup> Turkish Language Olympics, Boğaziçi University’s Wednesday evening Classical Music Concerts, Anatolian Fire Dance Troupe, 5th World Water Forum, AIREX - The region’s largest civil aviation fair, Istanbul Book Fair, the Aphrodisias-Laodicea International Youth Sports, Culture and Art Festival and World Congress of Chambers (Skylife, 2006-2009).

Turkish Airlines has also signed official sponsorship deals with football clubs FC Barcelona and Manchester United Football Club; National Basketball Association star Kobe Bryant, and has become the naming sponsor of the Euroleague Basketball in the previous year. In addition, 2010 tennis season top player Caroline Wozniacki has become the new face of Turkish Airlines Business Class and Comfort Class for three years (THY, 2010). Although these sponsorships’ can be classified as marketing and sales oriented there are some contributions to sport and society. For example Euroleague Basketball has organizing Special Olympics, the world's largest year-round sports training program for people with intellectual disabilities (Euroleague, 2011).

### **Marketplace**

Turkish Airlines joined the National Quality Movement, a quality campaign launched countrywide by the Quality Association KalDer in 1998, with all units and in 2006 the Company has earned an ISO 9001:2000 Quality System Certificate. At the same time through the ‘National Quality Good Will Declaration’ that signed with KalDer, Turkish Airlines is pursuing its efforts in the area of ‘Customer Satisfaction’ that we shared with you a few months back (Skylife, 2006). The CEO of the company, Mr. Kotil stated:

‘Our highest goal at Turkish Airlines is to maximize your pleasure and improve the quality of the services we provide...we aim to enhance customer satisfaction while achieving sustained growth and zero-tolerance for error’ (Kotil, 2006).

Turkish Airlines won numerous awards including the Best Airline in Southern Europe and World's Best Economy Class Onboard Catering at the 2010 World Airline Awards by Skytrax. In recognition of the services standards, Turkish Airlines was the only airline in Europe to receive 4 stars in all categories (THY, Presentations, 2010). Turkish Airlines was also awarded third place in Europe at the World Airline Entertainment Association's (WAEA) ‘Aviation Awards’ for in-flight entertainment service (Skylife, 2008). To reach the objective on the path of quality is continuous progress THY begun to keep all of processes under inspection and started ‘Honorary Observer’ and ‘Clandestine Customer’ project (Skylife, 2008).

## **Workforce**

Turkish Airlines employs 10.272 employees. Of these employees, 49.1% of them are female and 50.9% of them are male (THY, 2011). Networks of shuttle buses in every city that the company operates; additional benefits provided at birth, maternity, death, marriage, insurance, nursery, free or discount flight tickets are the Social Benefits that provided by the Company (THY, 2011). Turkish Airlines Personnel Social Foundation has a Nursery School. The Company organizes casual days, concerts, and shows and company top managers meet with employees and their families (Skylife, 2007) These events were valued by the CEO of the company as follows (Kotil, 2006):

‘As a company, we know that we must work together as one with all our personnel in order to give you the best possible service. We therefore cement those ties even further by coming together with our employees on several occasions throughout the year.’

Under the *Fair and Equitable Treatment* section of the Code of Ethics the Company it is stated that that equal employment opportunities and to treat applicants and employees in all interactions with the Company without regarding any discrimination.

## **CONCLUSIONS**

Corporate social responsibility is one of the emerging subjects in the aviation industry. However, there is still limited research into this area and a high majority of previous studies have mostly focused on the environmental dimension of CSR reporting. This current study looked at how Turkish Airlines reports its CSR efforts. According to the research findings, Turkish Airlines reports mostly on their safety, environmental and ethical efforts. According to the research findings, the level of CSR activities reported by Turkish Airlines is not very advanced. Although the carrier does not provide a separate CSR report, content analysis of the annual reports and the website shows that, compared to previous years, Turkish Airlines has a growing awareness about CSR activities and reporting. Integration of a special CSR section into its annual reports, establishing and publishing a formal code of ethics, and increasing CSR emphasis in its communication and sponsorship efforts can be evaluated as indicators of increasing CSR awareness. The findings from this current study are similar to the findings of several previous studies in the aviation industry, which have revealed low levels of CSR reporting among airlines (Cowper-Smith and De Grosbois, 2011). For airline companies, CSR activities should be held in a balance with concerning safety, responsibility, quality and profitability. At the same time CSR activities and its reporting should be realized in a continuous and systematic approach instead of individual and scattered activities.

**Reference list can be obtained from the authors**

# SUSTAINABILITY MARKETING IN THE AGE OF TURBULENCE: AN EXPLORATORY STUDY OF THE THAI TOURISM INDUSTRY

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## ABSTRACT

Sustainability marketing as an alternative approach to the mainstream marketing has recently gained more global interest. Until recently, the so-called “mainstream marketing” has traditionally focused on satisfying the customer need and maximizing consumption at the expense of natural environment and economic stability. Therefore this careless practice has inevitably led to the problems of climate change and global economic crisis. Sustainability marketing, on the other hand, emphasizes an awareness of the impacts of marketing strategies to the ecosystems, economic conditions, and the society at large. This exploratory study examined how a dedicated Thai entrepreneur in tourism industry can adopt innovative management and marketing approaches to solve the company problems during the age of turbulence. Qualitative research techniques are used in collecting and analyzing data. The result and recommendations are discussed.

**Key Words:** Sustainability marketing, Sufficiency economy philosophy, Tourism industry, Thailand

## INTRODUCTION

Until recently, the so-called “mainstream marketing” has traditionally focused on satisfying and the customer needs and maximizing consumption at the expense of natural environment and economic stability. Therefore this careless practice has inevitably led to the problems of climate change and global economic crisis (Fuller, 1999). For these reasons, success of companies that relying only on mainstream marketing will not last in the long run. Sustainability marketing, on the other hand, emphasizes an awareness of the impacts of marketing strategies to the ecosystems, economic conditions, and the society at large (Fuller, 1999; Belz and Peattie, 2009).

Tourism is one of the world’s most important industries. In 2008, there were 913 million international tourist arrivals with tourism receipts of US\$ 852 billion. It is estimated that tourism industry accounts for 30 percent of the world’s total service export and 45 percent of export services in developing countries (UNWTO, 2009). It also provides employment and foreign exchange earnings to both developed and developing countries around the world.

However, tourism is a fragile industry because it is highly sensitive to natural and economic environment. For examples, tourists love good weather and climate change lead to bad weather conditions such as snow storms and heat waves. This problem can reduce an attractiveness of the tourist destinations and thus deter tourists (UNWTO, 2008). Similarly, global economic recession can reduce tourists’ disposable incomes and means less tourist arrivals and expenditure.

For most business leaders, the twenty-first century is the dawn of the so-called “age of turbulence” (Kotler and Caslione, 2009). This means unpredictable and fast changes in global business environment. Those who are not yet ready to adapt their businesses to meet this new hostile environment will inevitably lost in the competition (Ranchhod, 2004; Kotler and Caslione, 2009). The global tourism industry is no exception of this phenomenon. Business owners and executives of this sensitive industry have recently faced new challenges of global economic recession and climate changes. Both of which are harmful to their business, and thus new approaches to tackle the problems are in need.

This exploratory study examined how a dedicated Thai entrepreneur in tourism industry can adopt innovative management and marketing approaches to solve the company problems during the age of turbulence. Qualitative research techniques are used in collecting and analyzing data. The result and recommendations are discussed.

## SUSTAINABILITY MARKETING

According to Belz and Peattie, 2009, 31, sustainability marketing (SM) refers to the logic of “building and maintaining sustainable relationships with the firm’s customers, the social environment and the natural environment.” In other words, it emphasizes an awareness of the impacts of marketing strategies to the ecosystems, economic conditions, and the society at large. For this reason, this approach is long-term and relationship-oriented (Belz and Peattie 2009). There are six major components of SM are as follows:

- Socio-ecological problems

- Consumer behavior
- Sustainability marketing values and objectives
- Sustainability marketing strategies
- Sustainability marketing mix
- Sustainability marketing transformations (Belz and Peattie 2009, 31)

## **SUFFICIENCY ECONOMY PHILOSOPHY**

Sufficiency economy philosophy (SEP) is proposed by his majesty the King Bhumibol Adulyadej, King Rama ninth, of Thailand since the early 1970s. This concept emphasizes stable and sustainable existence of human being and can be applied effectively to business sectors of all sorts and sizes (The Thai Chamber of Commerce, 2007). SEP will be beneficial to those individuals and organizations if the following two conditions and three Characteristics are met (The Thai Chamber of Commerce, 2007; Kantabutra, 2007).

The two conditions are knowledge and morality as follows:

- Knowledge refers to an act of knowledge accumulation from various sources and subjects that is useful to an individual or organization.
- Morality consists of four virtues, namely kindness, unity, honesty and justice. All together, morality leads to peace and prosperity if practiced.

The three Characteristics are moderation, reasonableness, and self-immunity system as follows:

- Moderation consists of two components namely sufficiency and appropriateness (not too much nor too little).
- Reasonableness refers to both evaluating the reasons for any action, and understanding its full consequences with the conditions of having knowledge and morality as the basis for decision-making.
- Self-immunity system means the readiness in coping with the coming changes by careful analysis of the situation and also its short term and long term consequences.

## **A CASE STUDY IN SUSTAINABILITY MARKETING**

### **Chumphon Cabana Resort and Diving Center (CCR)**

#### **A brief history of CCR**

CCR is founded in 1982 by Mr. Sukhum Rakphan as a small and peaceful resort in Chumphon Province in the Southern Thailand. Originally, CCR comprised five bungalows on the beautiful Thung Wua Laen beach. Its crystal clear sea, white delicate sand, and plenty of fishes and coral reefs attracts many visitors.

In 1994, Mr. Varisorn Rakphan, a Rungsit University graduate and Mr. Sukhum's son, became the new managing director of the resort. The new resort management expected to invest more in resort's rooms and facilities. Thus, a few years later, new development projects of 120 rooms in the resort were started with 150 million Baht loan for from a Thai financial institution. Unfortunately, the Asian economic crisis of 1997 had doubled debt burden of CCR to 300 million Baht. This hard-hit financial crisis forced Mr. Rakphan and his management team to rethink their management and marketing strategies.

A year later CCR faced new problem. Chumphon Province as well as CCR was under water due to huge rain storm. Mr. Rakphan had chances to meet the king's working team on rural development projects, and had been introduced the sufficiency economy philosophy (SEP) by a member of this team.

Afterwards, Mr. Rakphan and his management team redirect CCR to reduce debt burden through sustainability marketing ( as shown in Table 1) and self- sufficiency measures and projects (as shown in Table 2) such as growing rice in the resort own paddy fields, and recycling waste and water, making their own detergents and other operating equipments to reduce operating cost. Later on, Plearn garden (the word "plearn" was created by H.M.the King Rama sixth means Play and Learn) was created in 1999 to be a new attraction for visitors and customers. This garden was designed and built as lively museum to show how the king's sufficiency economy philosophy works. Nowadays, CCR's debt burden is reduced by half of its original size, and the resort income remains relatively stable even during low season.



Table 1

Major Sustainability Marketing Components of Chumphon Cabana Resort and Diving Center (CCR)

Sustainability marketing values and objectives	<ul style="list-style-type: none"> <li>• Developing CCR's vision, mission, marketing values and objectives that reflect the company awareness of social and environmental problems to ensure sustainability of the company</li> </ul>
Sustainability marketing strategies	<ul style="list-style-type: none"> <li>• Integrating stakeholders values and needs into corporate marketing strategies</li> <li>• Being aware of changes in the corporate environment in planning marketing strategies</li> </ul>
Developing Sustainability marketing mix	
Customer solutions	<ul style="list-style-type: none"> <li>• Offering organic and/or eco-friendly products and services</li> <li>• Reducing toxic waste and pollution by using biodegradable and reusable packaging and labeling</li> </ul>
Customer cost	<ul style="list-style-type: none"> <li>• Total customer costing (including post-use costs) through value-based pricing</li> </ul>
Convenience	<ul style="list-style-type: none"> <li>• An engagement of the local community and CCR's employees as active partners in the company's supply chain to ensure an availability of products and services.</li> </ul>
Communications	<ul style="list-style-type: none"> <li>• Informing customers about environmental friendly features of CCR's products</li> <li>• Encouraging customers to participate in the company various activities and initiatives to protect natural environment and ecosystems</li> </ul>

**Source:** Adapted from Belz, F.-M. & Peattie, K. (2009); and Fuller, D. A. (1999).

Table 2

Implementation of Sufficiency Economy Philosophy (SEP) at CCR

Conditions and Characteristics of SEP	Implementation of SEP at CCR
Two Conditions	
Knowledge	<ul style="list-style-type: none"> <li>• Seeking advices from experts of SEP</li> <li>• Sharing knowledge with other SEP practitioners in regular group meeting.</li> </ul>
Morality	<ul style="list-style-type: none"> <li>• Implementing fair trade and product safety policies.</li> <li>• Protecting natural resources and the ecosystems.</li> </ul>
Three Characteristics	
Moderation	<ul style="list-style-type: none"> <li>• Refraining from greed (excessive profit).</li> <li>• Investing carefully</li> </ul>
Reasonableness	<ul style="list-style-type: none"> <li>• Being aware of changes in the corporate environment.</li> <li>• Adopting long-term and holistic approaches in managing the company.</li> </ul>
Self-immunity system	<ul style="list-style-type: none"> <li>• Minimizing debt burden and reducing operating cost.</li> <li>• Taking stakeholders' demand as an input of corporate policy and strategies.</li> <li>• Self-sufficiency in recruitment and supply chain management systems.</li> <li>• Encouraging and nurturing in-house innovation in operating equipments instead of buying ones elsewhere.</li> <li>• Creating new market space to ensure income sustainability.</li> </ul>

**Source:** Adapted from Kantabutra, S. (2007); Leardviram, P. (2007); the Thai Chamber of Commerce (2007); and Rakphan, V. (2010).

## LIMITATION

This study applied qualitative research methodology in collecting data through structured interviews and observation. A case study research method was adopted. However, the outcome of this study based on single case study should be tested by more cases study and other research methods.

## CONCLUSION

This exploratory study examined how a dedicated Thai entrepreneur in tourism industry can adopt innovative management and marketing approaches to solve the company problems during the age of turbulence.

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# INVESTIGATION OF RELATION BETWEEN THE CLIMATE CONDITION AND ANNUAL TOURISM TREND IN KORAMABAD COUNTY

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## ABSTRACT

Climate is a significant factor in the development of tourism section activities. Therefore, the main objective of this study is investigation of climate condition impacts during the year on tourism and recreational activities in Khoramabad. Hence, the total monthly precipitation and average of temperature, hours of sunshine, wind speed, relative humidity, minimum relative humidity and maximum temperature data of Khoramabad synoptic station for 20 years statistical period (1986-2005) were used as well as the number of tourists who visited Falakolafak historical castle during 10 years statistical period (1986-2005). For analyzing the effect of these parameters on tourism activities, Tourism Climate Index (TCI) was used. The results revealed that winter (Jan, Feb, Mar) and December are not suitable for tourism activities because of the precipitation and low temperatures but spring and fall months (April, May, October, September and November) have the best conditions for tourism activities in Khoramabad. Also, July and August are not desirable for tourism because of high temperatures. According to the results, there is a significant positive correlation between the number of the tourists and average air temperature, shining hours and wind blow parameters, while there is a negative correlation between number of tourists and humidity and precipitation.

**Key Words:** Tourism, Climatic Conditions, Tourism climate index, Khoramabad

## INTRODUCTION

The roots of tourism go back to ancient Greece and the Romans (Baghai et al,2005).Tourism is a complex of activities in which a person or persons travels to an another place that is out of their ordinary life place. In addition they stay there at least one night and maximum one year. The purpose of their trips is leisure (Heidari,2008:22). Tourism development as part of the social and cultural dimensions of development of each country in addition to job creation and income creation is very important (Mohammadi and Feizi, 2007). This part from an economic viewpoint includes effects such as frequency of domestic currency in circulation accelerated, creating new employment, income distribution, sustainable development. Cultural, Tourism is a suitable tools for cultural relations (Mohammadi,2007). In recent decades the importance of tourism has been rising at the international level in terms of numbers and foreign exchange earnings (Sadr Mousavi,2007). According to estimates of the World Tourism Organization (WTO) in 2010, more than one billion tourist travel worldwide. Therefore, society takes efforts in terms of planning principles and provision of the necessary platform to take full use of it. Tourism, like other human activities are influenced by climate. Climate plays an important role in tourism activities at different levels. Climate can be as a local index for regional attraction. And it's also affecting on periodic activities, structures, functions and comfort of tourists (Ranjbar,2009). Climate is not only a temperature and physical factors, but also it's an aesthetic factor on how the plant community and environmental influences, etc . Through observation of countries' tourists statistics in different seasons we realize the importance and impact of climate on tourism. For example, in countries located in geographic areas monsoon synchronic with sever rains their tourists statistic dramatically reduced. So it seems obvious areas that have tourist attractions and potentials, their climate as an effective factor on tourism is assessed and evaluated and according to the threshold of human tolerance and comfort zones, the appropriate times for this activity determined than maximum satisfaction for the tourists to be accompanied. Hence, researchers have tried to present various indices such as TCI accurate picture of the climate to offer for tourists. Khoramabad city with 33.26 degree north latitude and 48.17 degrees east longitude is located in the beautiful Zagros Mountains in the West of Iran. This city, despite of capabilities and plenty of attractions for tourists, is still unknown and unfamiliar. Khorramabad has numerous structure of ancient, such as Falakol Alafak castles, whirlpool stone, brick minaret, bridge Shapoori, inscriptions, and natural riches such as mountains and beautiful springs and cultural attractions such as customs, dialects, music, local games and indigenous, although it is deprived of the variety of blessings of tourism. In this present paper by using of Tourist Climate Index (TCI) it is tried to determine the months that are optimal for tourists. Finally, a comparison between the number of annual tourists of Falak Alafak Castle and the final results of TCI index will be discussed.

## DATA AND METHODS

This study evaluates the effects of climate on tourism in Khorramabad . Methods used in this study to evaluate climate situation include TCI index. For this study we used the data from Khorramabad meteorological synoptic

stations in a 20-year statistical period (1986-2005). To examine how climate is associated with tourism numbers of Khorramabad city we have been using visitors statistic of Falakol Alaflak historic castle in a 20-year statistical period (1956-2005).

#### TCI index

Myskvytsky has provided this method for tourism in 1985. He has raised this method for climatic data that are widely available throughout the world. TCI combination of seven climate parameters is obtained so that the parameters are mean maximum temperature, mean temperature, mean minimum relative humidity, average relative humidity, total precipitation, average number of sunny hours, average wind speed. In June, despite the reduction in rainfall, there is an increase in average hours of sunshine and ideal temperatures. TCI has five sub indices that are obtained from the integration of above climatic parameters. Some of these sub indices have negative effects and some of them have positive effects on the TCI index.

Table 1 shows sub indices and climatic parameters of the TCI index

Table 1: TCI sub indices and amount of points they

Sub index	Climatic variables	TCI Rating
CID	mean maximum temperature and average minimum relative humidity	40
CIA	average temperature and average relative humidity	10
R	Total Precipitation	20
S	Number of sunny hours	20
W	Mean wind speed	10

CID and CIA are comfort indices in the TCI that rate them according to information obtained from the psychometric chart which is drawn in the thermal comfort standard Ashra. According to Ashra definition, thermal comfort is a subjective condition of the environment expressed satisfaction. Its means in Thermal comfortable cold or warmer conditions does not prefer more. Tourism climate index (TCI) is obtained from the following formula:

$$TCI = 2[(4 \times CID) + CIA + (2 \times P) + (2 \times S) + W]$$

All sub-indices used in the TCI, account for a range of 5 (optimal) to - 3 (extremely undesirable). Rate of 5 is the most desirable rate in the TCI Formula (Ranjbar,2009). Finally, after accounting for all the months of TCI, values obtained from this index includes a range from - 30 to 100 that 100 score as the ideal conditions for tourism and - 30 is undesirable conditions for tourism. Therefore, Tourist Climate Index (TCI) can be divided into 10 qualitative scales that are presented in Table 2.

Table 2: qualitative values of TCI index

Descriptive rating	TCI scores
Ideal	90 to 100
excellent	80 to 89
Very Good	70 to 79
Good	60 to 69
Acceptable	50 to 59
Negligible	40 to 49
Inappropriate	30 to 39
Very Inappropriate	20 to 29
Extremely poor	10 to 19
Impossible	-30 to 9

Finally, the source of climate tourists in each region is divided into six annual distributions. In fact these six distributions of a optimum climate for tourism ( $80 \leq \text{TCI}$ ) for every month of a year and a poor climate for tourism ( $40 \geq \text{TCI}$ ) is variable throughout the year (Scott, 2004).

## RESEARCH FINDINGS

Due to climatic situation of Khorramabad and according to TCI classification, in the months of January and February, due to reduction of day length, domination of winter conditions, having the lowest daily average temperature and creation of unsuitable weather conditions, the output of TCI index for this month shows number 54. This month's only wind factor almost is acquired a high rating other climatic elements are rated lower. However, they have acceptable values for tourism in TCI index. Although in March the maximum numbers of hours of sunshine and average temperatures have increased in comparison to the months January and February. But they have earned lower ratings because of having the highest amount of monthly precipitation. Its final score in TCI index was 58 and it's acceptable for tourism. Climate condition in April is very good for tourism. In this month according to the temperature and humidity daily thermal comfort is good and its allocated points are 5. Score of sub indices of rainfall and sunshine are lower. Because of spring precipitations and cloudy weather. May has an ideal climate for tourism in Khorramabad city. In this month the rates of final score in TCI was 90 and due to reduced of precipitation and increasing of numbers of sunshine hours and adjustment of temperatures, there is a favorable climatic conditions for tourism.

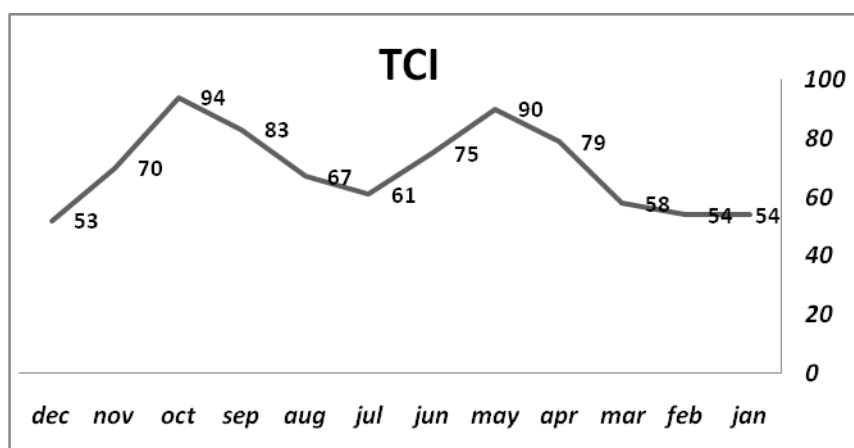
In June, despite of reduction in rainfall, an increase of average hours of sunshine and desirable of average temperature and relative humidity, due to the maximum average temperature and wind speed, causes the final score of TCI index lower by 15 points than that of the month before. This is because of blowing of hot winds and being located in a lower rank that gives it good means. According to the descriptive value of TCI the months of July and August have good climate conditions. These months include three factors of wind, rain and sunshine hours that are the same. In these months, due to the ruling of Azores high pressure, air is found stable and daily temperature reaches its maximum. And it has a bad effect on tourist satisfaction. In September, despite the decrease in maximum temperature and the ideal number of hours of sunshine, rainfall, average temperature and relative humidity for tourism, the wind continues as a negative factor that trigger the conditions. This month in terms of climate for tourism is placed in excellent row. In October due to moderate climate conditions, all the climatic factors affecting the TCI index are in a desirable situation. So in October, the highest TCI index points are acquired compared to other months and with 94 points they are located in the ideal situation for tourism. In this month according to the reduction of solar radiation compared with the summer season, the rate of energy perception from the sun is decreased. And given that rainfall this month has not yet started the quality of climate for tourism activities and leisure time is desirable and appropriate. In October, the thermal comfort conditions are suitable and there is a balance between the environment and human body temperature. In November, due to some pluvial systems by the westerly winds, rainfall increases and average temperature is reduced. So in November compared to the months September and October the points in the TCI index are significantly reduced. However this month has a very good situation in terms of climate for tourism. December, with 53 points has acquired the lowest score in TCI index. This month, except for the wind factor, in terms of climatic conditions is not favorable for tourism. December is the wettest month of the year after March in Khorramabad. Considering that the precipitation is rated 20 in the TCI index. Therefore precipitation reduced the final score of December. Table 3 shows the rate of TCI score and the quality of climate conditions for tourism in Khorramabad .

According to Scott and Boyle's theory (2004), tourism climate of different regions of the world can be divided into six annual distributions. Types of tourism climate of an optimum climate for tourism ( $80 \leq \text{TCI}$ ) for every month of a year and a poor climate for tourism ( $40 \geq \text{TCI}$ ) are variable throughout the year (Ranjbar, 2009).

Table 3: The rate of score and quality of climate conditions for tourism in Khorramabad

Descriptive value of TCI	TCI points	Months
Acceptable	54	January
Acceptable	54	February
Acceptable	58	March
Very good	79	April
Ideal	90	May
Very good	75	June
Good	61	July
Good	67	August
Supreme	83	September
Ideal	94	October
Very good	70	November
Acceptable	53	December

As Figure 1, months October height of having and show season of tourism.

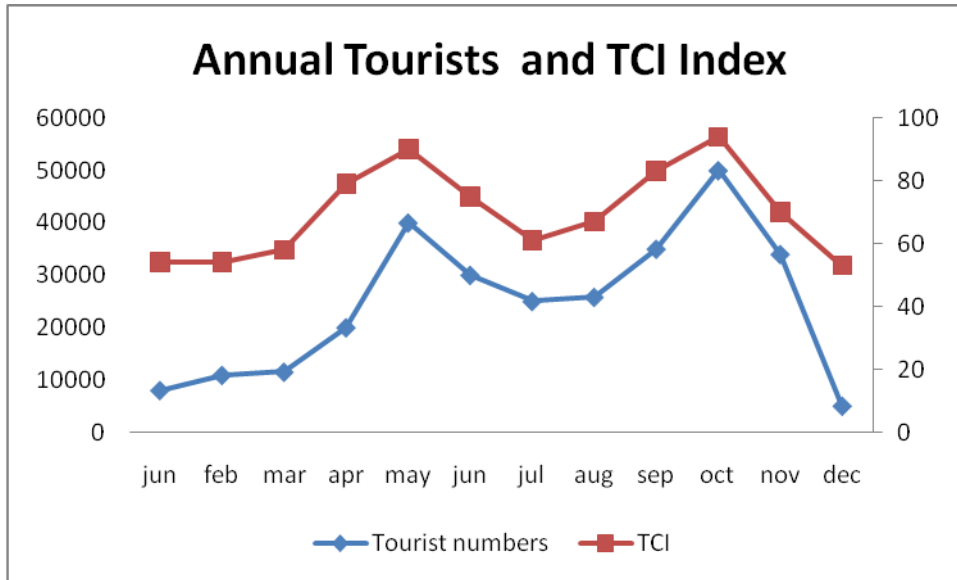


indicated in in Khorramabad of may and are located at the chart due to the highest score two suitable climate for

### Relation between Weather and Tourism

Khorramabad city due to having very good weather and being in communication path of Tehran – South, attracts many tourists annually. The Goal of many of them is visiting the historic castle of Khorramabad. The numbers of Falakol Alaflak Castle tourists are over 123,000 people annually. This could be due to the development of communication facilities such as roads, railways and air transport, increasing the number of public and private vehicles in recent years. Most of the visitors from Falakol Alaflak Castle belong to April and the lowest numbers belong to January. In general, winter months have the lowest number of visitors and spring months have the highest numbers of visitors. Holidays in Iran have an important direct effect on travel and tourism, but the effects of environmental and climatic situations on the selection of tourism destination should not be ignored.

Figure 2:annual tourists and TCI index



As can be seen from the trend of annual tourism of Falakol Alaflak Castle, the TCI index for Khorramabad gives the highest rating to May and October. Numbers of tourists in the Falakol Alaflak castle have the highest numbers in these months and in cold months the number of tourists is dramatically reduced.

## CONCLUSION

Tourism development as part of the social and cultural dimensions of development in each country in addition to job creation and income creation is very important. Climate can act as a local index for regional attraction and also affects the periodic activities, structure and function and comfort of tourists. This study has been done to assess the climate situations for tourism in Khorramabad city. This study shows that there are favorable climatic conditions for tourism over the year in Khorramabad city. The results of TCI index shows that there is a moderate climate in Khorramabad. During a year December and January have the lower quality of climatic conditions for tourism in comparison to the other months due to cooling temperatures and lower rainfall. October and May have the best conditions and quality for tourism in Khorramabad. TCI index is a suitable criterion for analysis of relation between climate and tourism in Khorramabad. The final score of the TCI index for Khorramabad is not less than 50 during any of the months and this shows that there isn't any climatic situations during the year that could hinder tourism in Khorramabad. By comparing the numbers of annual tourists from Falak Alaflak castel with the final results of TCI index it is determined that there is a direct relation between numbers of tourists and the results of TCI index. In the months that TCI index has the highest rating there are the highest numbers of tourist visitors. Conversely in cold months when there aren't suitable conditions for tourism the numbers of tourists are decreased.

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Please contact authors for references



## HOTEL CSR FACTORS – CASE OF SLOVENIA

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### ABSTRACT

Corporate social responsibility (CSR) presupposes that a company's management in its decision process is led not only by economic motives, but also by the effects a company has on the environment. CSR is an important issue for hotels as they often operate in delicate social environments and ecosystems and one of their core needs is the presence of natural and cultural attractions. Different factors influence the position of hotel managements and actual management rulings in connection to CSR. The results of a preliminary study carried out in Slovenia on the impact of these distinct factors on managers' decision-making are presented.

**Key Words:** CSR factors, hotel, Slovenia

### INTRODUCTION

It can be said that corporate social responsibility (CSR) has in some subconscious forms existed as long as business itself. But only in the 1970's did managers start taking concrete steps towards responsible conduct of business with a clear awareness of the mutual dependence between business, environment and society (Smith & Nystad, 2006). Although the CSR concept today contains many different and even controversial approaches and theories that make it sometimes hard to embrace unequivocally, it is basically grounded on the idea that a company's management decisions are not led only by economic motives or profit maximizing but also by the effects a company has on the social and natural environment. Any business company's primarily goal is economic profit. But this goal can be achieved in many different ways. Furthermore, the approaches for ensuring long term profitability might be quite different from those oriented towards short term profitability. CSR is in its essence pretty much connected to the issue of sustainability since no business ignoring the needs of stakeholders, including the employees, suppliers and local community, can survive over the long term. Of course, the remoteness of consequences may often provide the opportunity for short term interests (in the sense of uncompromising profit maximization) to prevail.

Due to a variety of social and political systems, industries, etc., it is practically impossible to define the CSR concept once and for all in full extent. Nevertheless, the definition of CSR provided by the European Commission (2004) seems to offer a common denominator stating: "CSR is a concept whereby companies integrate social and environmental concerns in their business operations and in their interactions with their stakeholders on a voluntary basis". Simply doing business in conformance with legal requirements and contracts cannot be considered CSR. In order to practice CSR a company should of course comply with the formal frames of doing business, but also go beyond these frames. Van de Ven & Graafland (2006), quoting the Social Economic Council of the Netherlands, claimed that CSR integrates two main missions: long term care for social welfare and a fair relationship with all stakeholders. Besides the economic aspect of value creation which includes production of goods and creation of employment, ecological and social aspects of an enterprise's operation should be given due attention.

With globalization and the growth of multinational companies' business interference with local communities and other stakeholders, the situation has become extremely complex, causing an increasing need for understanding and implementation of the CSR concept. In today's world we can no longer maintain the standpoint that corporations have no social responsibilities beyond profit maximization within the confines of the law, as these confines do not ensure the internalization of all the social and environmental costs caused by production (Williams, 2002).

Factors influencing CSR can be classified into internal and external (European Commission, 2004). Internal factors encompass managers' values and commitment to conduct business in a responsible way even when this might not be best for the profitability of the firm, and minimisation of risk and maximisation of business opportunities through implementation of CRS principles. The rationale of the latter factor is that business success in the long term will be better in companies practicing responsible and sustainable operation and development. This can be achieved through reducing costs by eco-efficiency, insurance policies, sensible consumption of resources, anticipation of societal and stakeholder expectations, differentiation from competitors, good reputation, attractiveness for investors, etc. On the other hand, external factors are the activities, pressures and influences originating from the outside of the company from different parts of society: investors, customers, suppliers, NGOs, trade unions, business networks, public authorities, and so forth. These stakeholders behave in line with their own values and indirectly or directly influence the framework in which decision-making is taking place. Organizational characteristics of the company, such as size, location, organizational culture, as well as market position, financial performance and openness to changes can considerably affect the level of CSR, too (Haddock-Fraser & Tourelle, 2010; Heslin & Ochoa, 2008; Yen, Hollenhorst, Harris, McLaughlin & Shook, 2006).

Arising from the above factors, two distinct groups of managers' motivation for developing and implementing responsible business practices can be identified (Van de Ven & Graafland, 2006). On the one hand, ethical (intrinsic) motives of managing staff and their moral commitments to behave in a responsible way can be the main driving force for CSR; on the other hand there are the so called strategic (instrumental) motives which consider that CSR may pay off in the long run (Lopez-Gamero, Molina-Azorin, & Claver-Cortes, 2010; Smith & Nystad, 2006). CSR can improve a firm's profitability through an improved social reputation and consequently higher appeal for socially conscious customers, satisfied employees with enhanced loyalty and a positive attitude toward work, tax relief and previously mentioned levers. Van de Ven & Graafland (2006) in their research found that ethical motives are reflected to a higher degree of actual CSR performance than strategic motives; while Murphy (2001) regarding the case of "corporate societal marketing," even distinguishes between CSR and business ethics, considering them to be two separate concepts, the latter more internally oriented, the former more sophisticated, externally oriented and less philanthropic. It has to be stressed, though, that a company can meet both economic and ethical objectives simultaneously (Smith & Nystad, 2006).

While the ethical motivation of managers might or might not be influenced by stakeholders, the strategic motivation towards CSR is one way or another stimulated by one or more stakeholder groups. The main groups are: employees, guests/customers, government, local people, suppliers, and the local community. Van de Ven & Graafland (2006) add competitors who can act as important references. Stakeholders influence manager attitudes towards CRS by pressure or by reward (Lopez-Gamero et al., 2010). Pressure may be exerted by the threat of a drop in demand, isolation of the company from the rest of the society, by influencing the firm's reputation, by reduction of the shareholder value, by legislative restraints and penalties, subsidiaries, etc. On the other hand the rewards appear in terms of better cooperation and dialogue with a firm regarding its operation and in the process of new products development. In the field of tourism where a consistent destination umbrella brand is crucial for sensible marketing, such cooperation is a pre-condition for success (Pike, 2005). Furthermore, the resource-based view theory mediates the positive relationship between environmentally responsible operations and long term competitive advantages and profitability (Lopez-Gamero et al., 2010).

In comparison to the manufacturing industry, the hotel industry has been generally perceived as relatively non-problematic in terms of its negative impact on the environment. Moreover, there is relatively little legislative pressure in the hospitality industry; besides, the regulations concerning CSR are oriented much more toward an engineering view than toward business standards (Lopez-Gamero et al., 2010). However, experiences from several coastal tourism destinations show that vast degradation (social, environmental and/or cultural) can be caused by the irresponsible operations of hotels (Agarwal 1999). Yen et al. (2006) list the following negative impacts of hotel operations on the environment: residual chemicals, waste water, deforestation, disparity in incomes and abuse of child labor. Of course, many other specific impacts, such as visual degradation, crowds, lack of parking spaces, encroachment on traditional lifestyle of local people, etc., could be added for different destinations.

If such negative examples are to be avoided in the future, clear comprehension of the motives that lead hotel managers to more responsible conduct of business is required. Despite the popularity of the CSR topic, so far relatively little research has been done in the field of hospitality. Furthermore, results are very inconclusive (Rodríguez & Cruz, 2007). The aim of the paper is to present results of a preliminary study carried out in Slovenia on the motivation and impact of different factors on managers' attitude towards CRS and their decision-making. The results of the research can help DMOs, governments and other stakeholders to understand

the levers of CSR and take efficient actions towards a more sustainable development of tourism both in Slovenia and elsewhere.

### CSR in Slovene hospitality business

The debate on CSR stems from the interdependence of environment and companies, which is especially relevant for the hotel industry. For the hotel the environment is at the same time a physical support of its activity and part of its product (Rodríguez & Cruz, 2007). There is some empirical evidence that SMEs, where a vast majority of independent hospitality establishments fit (Bowen, Jones, & Lockwood, 2006), are less involved in CSR than large companies (Haddock-Fraser & Tourelle, 2010; Van de Ven & Graafland, 2006). Undoubtedly, lack of financial and human resources represent a strong limitation to the adoption of CSR practices (Yen, et al., 2006).

In Slovenia the majority of hotels fall into the category of "small hotels," as only 10% of them have more than 100 rooms. In 2009, 269 hotels and 11 motels were registered with 38,778 and 460 beds, respectively. In the same year they accomplished 5,404,809 overnights, which accounts for 60% of all officially registered overnights (SURS, 2011). Almost a third of all overnights were realized in health resort hotels, a quarter at the seaside, and a fifth in the mountains. Approximately 10% of overnights were in the capital, Ljubljana. Average occupancy rate at the national level is 46.4% (SURS, 2011).

Besides independent establishments there are six hotel groups (Bernardin Group, Life Class, HIT, Krka Zdravilišča, Terme Čatež and Sava Turizem), together representing about 75 % of all hotel capacity in Slovenia. There are also two international hotel chains - Kempinski and Austria Trend Hotel in Ljubljana, as well as Best Western hotel consortia with three hotels, one in Ljubljana and two in Bled. Some hotels are members of other consortia such as Small Luxury Hotels, Steigerberger, Relais et Chateaux, etc.

According to Lopez-Gamero et al. (2010) Spanish hotel managers perceive CSR as a potential element of differentiation and acquirement of the competitive advantage in the long term, but they believe that adoption of certification systems is too costly and could in the short term even reduce their competitiveness. They would be willing to invest some money and efforts into CSR practices only if the absence of such practices negatively affected the demand. Thus, guests and tour operators' requests are potentially the most influential factors. Nevertheless, presently they both seem to put in their choice process more emphasis on service quality than on the environmental practices of hotels. From previous informal conversations with hotel managers one can conclude that the described situation seems to be very similar in Slovenia. Despite several cases of good practices just a few hotels have their social-environmental responsibility somehow formalized. In Slovenia only two hotels acquired an international eco label: Park EKO Hotel Bohinj (Green Globe), and Terme Snovik (The European Eco-label for tourist accommodation service).

### Research

In order to find out how familiar the CSR concept is to Slovene hotel managers, along with the perceptions and eventual experiences with it and the influencing factors and motives of engagement in responsible practices, in-depth interviews with top managers were carried out in January 2011.

A convenience sample was compounded by five executive directors of hotels and one president of the administration board of the hotel group. In table 1 basic information of the sample are shown.

Table 1  
Sample information

Interviewee	Function	Status	Hotel type	Location
A	Executive director	Member of a group	Resort hotel	Bled
A1	President of the board	Group of resort hotels		Bled
B	Executive director and Deputy Mayor of Bled Municipality	Independent	"Natural attraction" hotel	Postojna
C	Executive director	Independent	ECO hotel	Bohinj
D	Executive director	Independent	Business hotel	Ljubljana
E	Executive director	Independent	City hotel	Ljubljana

Two of the executive directors were from business and city hotels (Ljubljana) and three from inland (not coastal) hotels (Bohinj, Postojna, Bled). Among the interviewees was the manager of Park EKO Hotel Bohinj. All interviews were recorded and transcripts were analyzed qualitatively.

On the question about familiarity with the CSR concept all the interviewees answered that they are familiar with it; it was, however, often mentioned that "*CSR is the same as sustainability*". The notion is associated with a fair relationship with the natural environment and stakeholders, especially employees. When asked about their internal CSR strategies, most of the managers answered with slight hesitation. They all conform to the prescribed legal rules, and have some internal order codex, yet regarding the CSR there are only loose guidelines. An additional explanation was needed about CSR and some direct examples, to which they quickly found good practises within their companies. Thus it may be stated that the notion of CSR is not understood well enough for the time being, and at the same time, it is often practised even without managers or staff realizing it. CSR strategies are not always formally written down as guidelines or codex; managers tend to set rules on the basis of everyday inspiration and communication. This absence of a systematic approach might be seen as a pitfall, although sometimes constant informal quality communication may be effective, too.

To better understand the background managers' motives for CSR their classification into the two categories (ethical and strategic) was made. Interviewees A1, B, E and partially C stressed that ethical motivation is the one that primarily leads their CSR policy.

A1 (the president of the board of administration) stated for example: "*Responsibility, excellence, creativity, fairness and knowledge. Those are our company's main values, which we truly accept and actually act upon ... Bled is a sensitive environment and responsible tourism is necessary.*"

Interviewee B pointed out: "*Firstly, these are values that all humans share and are – or should be – somehow brought up or educated.*"

The ethical and »human« approach is felt strongly throughout the interview with E: "*We are engaging in a healthy work atmosphere, we communicate a lot, (...), which is our regular practice, since we have quite a diversified workers' structure.*"; "*We do have codices, but it is all about the basic, personal ethics.*"

Interviewee C stated combined motives of ethics and business strategy. This blended dual motivation is confirmed throughout the interview:

*"CSR .../ it represents personal ethics, family tradition, and we also see it as a competitive advantage.../ We give high importance to the equity of our employees. (...) The quality work of each one is what matters for the provision of a high quality product. We clearly set all the rules and demands in this respect at the beginning, when somebody joins us."*

On the other hand interviewees A and D see strategic motives as more important. Interestingly, interviewee A seemingly did not internalize the commitment of his president (A1) and took a relatively passive business position about CSR strategies within the company:

*"These are the politics of our head organization. We, the hotel managers, don't have much influence on that."*

On the other hand, he expressed openness to adopting CSR practices:

*"Every one of the factors encourages us; all are involved in a strategic politics of the future."*

Interviewee D focused on company and stakeholder demands:

*"Hospitality is such an exact branch that demands many elementary prescribed standards ... We have those prescribed by law and those which we believe our company needs.../ Market, social and managerial responsibility forces us to implement certain standards within the organization..."*

This hotel has the highest number of protocols, and their strategic mindset has been evident also by her answering a question about the working atmosphere; her answer consisted of statistics and a financial view of measuring the atmosphere.

Throughout the interviews it was felt that managers do not think of CSR explicitly and systematically. Especially with regard to strategic motivation it seems that, although some of them feel in the future some competitive advantage could be achieved through CRS practices, potential concrete benefits are not clear to managers. A peculiar comment could be added at this point. For the case of Bled (which is one of the most developed and luxurious Slovenian mountain resorts) three levels of power are represented among the interviewees. Firstly, a hotel manager, secondly, the same hotel's upper manager (president of the board), and finally, a deputy mayor of the municipality of the same destination. The interesting point is that the higher the

position of the interviewee the more acute is their perception/expression of the responsibility. This could be due to inefficient vertical communication or the lack of true engagement for implementation of the proclaimed policies.

## **Discussion**

Despite the small sample the research made possible some insight into the present state of CSR and motivations for it in the hotel industry in Slovenia. None of the interviewed managers would dismiss CSR as “unimportant”; they all agree that it is a “must” and the only possible way, whatever the start-motive is. All of them also affirmed that they have programmes or plans to enhance their responsibility in the near future. However, upon further investigation the gap between theory and practice became evident. In most cases, only sporadic practical cases of CSR within their management could be said to represent a state of responsibility in terms of CSR.

It is plausible to claim that organizations define and act upon their CSR politics predominantly with regard to customers’ expectations and claims; our preliminary results may indicate the level of existing customers’ responsibility regarding their consumer choices and consequences that follow are close to non-existent. External stakeholders may also have a distinct influence on an organization’s CSR practices (Heslin & Ochoa, 2008); however in Slovenia it is difficult to talk about pressures on (in our case) hotels’ management to redirect their practices to a more sustainable/environmental friendly/responsible future. Different civil initiatives and interest groups, even the media, most often exercise their pressure on industrial organizations; only rarely do they target hotel facilities.

Managers are thus predominantly motivated by personal ethics, general responsibility – conscience; though the combination of both motives was often felt in interviews. To a certain degree the guidelines of the owner, some obligations arising from certificates, and at some point also customer demands – even if they are not stated directly - influence their decisions. All managers agreed that CSR is necessary for long-term success. The image or reputation and acceptance by the local community are stated to be two main strategic benefits gained by responsible operation. Nevertheless, generally, the approach to CSR is non-systematic and its goals relatively poorly articulated. Especially regarding the strategic motivational factors it seems as though the interviewees do not believe CSR may really pay off in financial terms. This stand is in congruence with obstacles for the CSR approach adoption identified by the European Commission (2004), which stated that CSR practices require a lot of effort and adaption on the part of organizations; they may be costly and time consuming, some additional records should be kept, particularly SMEs, may be facing the lack resources and necessary skills, etc. And finally, tools and examples of good practices of CSR are relatively poorly available.

We believe that the most effective measures encouraging more intense CSR of hotel operations would be the systematic promotion of the strategic advantages and benefits of CSR, and - as a long term goal - strategic market repositioning of destinations towards tourism segments with a higher consciousness that are willing to (implicitly) pay the prices of responsible practices. Finally, some easily accessible educational programs on specialized skills for CSR practices should be organized for those managers who are willing to become involved in CSR but feel they do not have the proper expertise to do so.

As a methodological weakness of the presented research it should be considered that managers tend to take a formal position when answering research interview questions. Therefore it is possible that an extra “business” note was added to the managers’ answers. It is therefore possible that the actual state of CSR is even weaker than shown.

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# THE POTENTIAL FOR ABORIGINAL ECOTOURISM DEVELOPMENT IN ONTARIO

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## ABSTRACT

Aboriginal ecotourism is a relatively new concept to the tourism industry in Ontario, Canada; therefore, very few studies have been conducted to determine its current state or potential. Aboriginal ecotourism, in principle, fosters, promotes and preserves Aboriginal culture and traditions. Within Canada, and internationally in destinations such as Australia and New Zealand, Aboriginal ecotourism has been successfully developed and promoted. In the province of Ontario, however, there is no comprehensive strategy for the development of Aboriginal ecotourism, despite the enormous market potential and benefits that may exist. Through interviews with Chiefs of Ontario First Nations, this paper provides an analysis of the potential for Aboriginal ecotourism in Ontario. The findings from this paper can be applicable to indigenous tourism worldwide, and can provide insight into the benefits and barriers that may assist or hinder tourism development in this context.

**Key Words:** Aboriginal ecotourism, Ontario

## INTRODUCTION

According to Notzke (2004), Aboriginal tourism development in Canada falls short of its true potential. Based on the 2006 Canadian census, 3.8 per cent of the Canadian population is Aboriginal. The census also identified that eight in every ten Aboriginal people live in Ontario and the western provinces (Statistics Canada, 2006). If the share of Aboriginal people's contribution to the world's fastest growing industry was in proportion to their population, Aboriginal tourism would be a \$1.6 billion industry, providing 30,000–40,000 jobs in Canada (Notzke, 2004). In reality, the current Aboriginal tourism industry in Canada is estimated at \$270 million, employing only 14,000–16,000 people - less than half of one per cent of the Canadian industry (Notzke, 2004; Rostum, 2002).

There is no consensus on the definition of Aboriginal ecotourism (Aboriginal Tourism Canada, 2004). However, there are several general elements that are integral to Aboriginal ecotourism: a focus on environmental sustainability, education, and promotion and sharing of Aboriginal culture by the host communities (Graci, 2010). A more literal definition of Aboriginal ecotourism is community-based tourism where guests staying in Aboriginal lodging facilities are able to take away a unique experience, but also give back to the community they have visited (Blangy, 2010).

Due to the poor social, environmental and economic state of many Aboriginal communities in Ontario, there are several benefits to this form of tourism development. Aboriginal communities across Canada are increasingly turning to tourism development as a means to pursue both economic interests and cultural revitalization. Aboriginal ecotourism development aims to increase community capacity by focusing on ways to improve and sustain the well-being of the host community (Chaskin et al., 2001). Community capacity can lead to benefits such as the preservation of Aboriginal natural and cultural heritage, increased education and training, knowledge of tourism development, and financial stability.

The literature has also identified that despite the benefits, several challenges exist which impedes this form of development. Participation in the tourism industry raises issues and concerns for Aboriginal communities, varying from the maintenance and respect for traditional values, authenticity, environmental impact, resource consumption and effect on future generations. In addition, as would be the case with the emergence of any new industry, product development, provision of infrastructure, market development, private-public sector collaboration and human resource development issues also need to be addressed.

This paper examines both the benefits and challenges of Aboriginal ecotourism development in Ontario and if it was developed, what elements would be included. It can be applicable to indigenous tourism worldwide, and can provide insight into the benefits and barriers that may assist or hinder tourism development in this context.

## METHODOLOGY

Web based surveys were conducted with the Aboriginal Chiefs in Ontario in May –August of 2009. A survey that contained open ended, closed ended, ranking and rating questions was sent to all the Aboriginal Chiefs in Ontario through the electronic tool, SurveyMonkey. No sampling method was required, as the entire population of Aboriginal Chiefs in Ontario was contacted for the survey. A comprehensive list of Aboriginal bands including the Chief's name and personal email were obtained through the Department of Indian and Northern Affairs in Canada. In total, 124 electronic surveys were sent out and 26 responses were received for a sample of 21%. Not all the surveys were fully completed. The survey faced a number of limitations which affected the response rate. The survey was conducted in the summer of 2009. Summer is traditionally an active season for Aboriginal groups. In addition, as this was an internet based survey, it may be possible that access to the Internet was limited in some communities. The survey sought to identify the best practices of Aboriginal ecotourism within Canada; the potential for product development, and the benefits and challenges to this form of tourism development. It also sought to determine incentives that may be required in order to successfully develop this tourism product in Ontario

## FINDINGS

The research results reflect the data collected from the web based surveys. The Aboriginal Chiefs who responded to this survey have come from a wide array of communities with their own characteristics and backgrounds.

### *Current Environmental and Cultural Practices in Aboriginal Communities*

The survey sought to determine the current environmental and cultural practices currently being undertaken in the Aboriginal communities in Ontario. In order to determine the potential for Aboriginal ecotourism, the current practices were examined to identify if environmental and cultural philosophies were integrated into the community. Environment and culture are intertwined through Aboriginal tradition, and therefore are very relevant to ecotourism practices. When asked whether or not the issues of climate change and environmental conservation have a big impact on their community, 78% of the respondents indicated that there is an impact. 89% also indicated that responsible management of natural resources is very important to their community. Environmental values are entrenched in Aboriginal culture as identified by one of the respondents "...spiritually, many of our people still pursue a significantly traditional lifestyle on the land" (Respondent 23). Respondent 11 recognizes that "we are biological creatures that co depend on our environment for our survival. If Mother Earth dies, we will follow." Wildlife loss, weather changes, and water were expressed as prime concerns relating to climate change (respondents # 9, 15, 21, 22, 27). Respondent 27 explains that "We do not see the animals any more. The trees are dying. The water is no good to drink". As a result of the effects from climate change, Aboriginal communities are experiencing difficulty with resources which in turn is straining their ability to live a traditional lifestyle.

In addition to the environment, cultural practices are a central aspect of Aboriginal communities. Cultural preservation is quite important for all respondents of the survey. The majority of communities (60%:) currently have cultural preservation practices and policies in place. Cultural or healing centers focusing on language, tradition, ceremonies, harvesting and medicine are key focuses of some responding communities (respondents # 6, 11, 15, 24, 26). It is evident that the environment plays a large role in Aboriginal culture, and is therefore a focus in many of their traditions.

### *Current Aboriginal Ecotourism Interest and Knowledge*

There is an identified interest from Aboriginal leaders to develop Aboriginal ecotourism in their communities. All responding Aboriginal communities are open to developing an Aboriginal ecotourism business in their community for various reasons. However, a minority of Aboriginal leaders (39%:) would prioritize the development of an Aboriginal ecotourism business over other industries in their community.

Although 83% of respondents currently do not implement any form of ecotourism in their community, 65% are aware of existing Aboriginal ecotourism businesses elsewhere in the world, from nearby communities in Ontario (respondents 4, 6, 9, 12, 20, 21, 22, 23) to international Aboriginal ecotourism attractions (respondent 10). The ecotourism businesses identified by respondents are vaguely described as camps, lodges, and wilderness trips (respondent 7). Respondent 23 explains that "There are a number of guided lodge based businesses in the area that provide a partial Aboriginal ecotourism experience." Of the 17% of Aboriginal communities that do currently offer ecotourism, the activities include song/storytelling, handicrafts, cooking, plant tours, wildlife viewing, and accommodations (respondents 9 and 20).



The survey also identified that if Aboriginal ecotourism was developed in their community, that there would be a number of activities that they would be interested in sharing with tourists. Respondents identified that cooking traditional Aboriginal food (100%), songs and storytelling (89%), handicrafts (89%), Aboriginal language education (78%), sharing of traditional festivals and celebrations (72%), wildlife viewing tours (72%), traditional canoe route tours (72%), traditional dances (61%), tours/education of traditional uses of plants (56%) and tours of traditional hunting grounds and trails (56%) are activities that could be undertaken as part of the Aboriginal ecotourism experience in their community.

### ***Benefits of Aboriginal Ecotourism***

There are several benefits associated with Aboriginal ecotourism development. Aboriginal ecotourism has the potential to benefit Aboriginal communities through economic development, reducing reliance on government assistance, increasing community capacity through education, skills and training, and cultural and environmental preservation. Table 1 identifies the ranking of benefits Aboriginal communities see in implementing an ecotourism business in their community (on a scale of 1 to 5, where one is the lowest and 5 the highest). Preservation of local culture, history and traditions (4.78); increased employment (4.72); the opportunity to educate others about Aboriginal culture (4.72) and environmental preservation (4.67) are seen as the most significant benefits to Aboriginal ecotourism development.

**Table 1: Benefits of Aboriginal ecotourism**

<b>Benefit</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>Mean</b>
Preservation of local culture, history and traditions	0	0	1	2	15	<b>4.78</b>
Increased employment	0	0	1	3	14	<b>4.72</b>
Opportunity to educate others about Aboriginal culture	0	0	0	5	13	<b>4.72</b>
Environmental preservation	0	0	1	4	13	<b>4.67</b>
Educational opportunities for individuals in Aboriginal communities	0	0	1	6	11	<b>4.56</b>
Fostering a feeling of pride and success within the Aboriginal community	0	0	1	7	10	<b>4.50</b>
Increased economic stability for the community	0	1	1	7	9	<b>4.33</b>
Increase independence and self-reliance from the government	0	0	2	5	10	<b>4.22</b>
Increased income for the communities	0	0	1	8	8	<b>4.17</b>
Ability to invest profits from business back into the community	0	0	3	4	10	<b>4.17</b>
Infrastructure development (roads, buildings, etc)	0	0	6	5	6	<b>3.78</b>
Increased stakeholder share in federal and provincial politics	1	4	3	2	6	<b>3.11</b>

*n*=18

In addition to the prepared list of possible benefits in the survey, respondents were given the opportunity to express any other benefits they felt were excluded. One respondent explains “What is most important is to motivate and provide opportunities for our people to develop their economic potential. This is more important than earning money directly for the community because successful community members will inject a tremendous amount of money into the community if they are running successful businesses” (Respondent 23). Autonomy and a diversified economy are two other benefits of introducing Aboriginal ecotourism into some communities (Respondents 7, 11).

Aboriginal ecotourism was considered a method to help overcome current barriers in Aboriginal communities in Ontario. 93% of Aboriginal Chiefs believe that the development of an Aboriginal ecotourism industry in their community could help overcome some existing social and economic barriers. The majority of respondents believe that many barriers could be overcome with the development of responsibility and employment opportunities in the community that are not currently available (respondents 25, 12, 11, 7, 4).

### *Barriers to the Development of Aboriginal Ecotourism*

Many barriers to developing Aboriginal ecotourism were identified through this study. Table 2 identifies the barriers that may impede developing an Aboriginal ecotourism product in Ontario. The barriers were ranked on a scale of 1 to 5 where 1 equaled the least significant barrier.

**Table 2: Barriers to Aboriginal Ecotourism Development**

<b>Barrier</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>Mean</b>
Lack of access to credit and start-up funds	1	2	2	6	6	<b>3.82</b>
Lack of skills and business experience (marketing, business development, business management experience)	2	2	4	4	5	<b>3.47</b>
Lack of communication between stakeholders (communities, tourists, tourism organizations, governments, etc)	0	2	8	4	3	<b>3.47</b>
Dependency on government resources	0	2	2	6	5	<b>3.47</b>
Existing social issues within the community	1	3	5	3	5	<b>3.47</b>
Apprehension from community to share Aboriginal culture and traditions	2	2	4	4	5	<b>3.47</b>
Lack of commitment from communities and tourism associations to developing ecotourism	1	3	5	5	3	<b>3.35</b>
Lack of education and training	1	4	4	5	3	<b>3.29</b>
High operating costs for tourism businesses in remote locations	4	1	3	4	5	<b>3.29</b>
Lack of infrastructure, quality services and amenities	2	2	5	6	2	<b>3.24</b>
Negative stereotyping	3	4	4	3	3	<b>2.94</b>
Competition from other tourism businesses in the area	3	4	5	3	2	<b>2.82</b>
Location	5	2	5	2	3	<b>2.76</b>
Lack of technological development and resources (computers, Internet connections, software, etc.)	3	6	3	4	1	<b>2.65</b>

*n*=17

The most significant barriers seem to be lack of access to credit and start up funds (3.82) and lack of business skills and experience, communication between stakeholders, dependency on government resources, existing social issues and apprehension from the community to share Aboriginal culture and traditions (3.47). The lack of the ability to define Aboriginal ecotourism was also cited as a barrier. This study revealed that Aboriginal chiefs are not able to concisely define Aboriginal ecotourism, or its main components which leads to difficulties in actual development and marketing of the industry.

Respondents were asked about the definition and crucial components of Aboriginal ecotourism. There was a wide array of definitions and a general lack of agreement on a concrete definition of the term Aboriginal Ecotourism. 65% of survey respondents said that they were familiar with the term; however, when asked to

define the term, no respondents identified all three integral elements of Aboriginal ecotourism: environmental sustainability, education, and the promotion and sharing of aboriginal culture by the host community.

## **DISCUSSION AND CONCLUSION**

Through this survey, it is evident that Aboriginal ecotourism development is something that many Aboriginal Chiefs believe would be beneficial to their community by helping to conquer social and economic barriers their communities often face. The results of this survey seem to demonstrate that although the majority of communities seem interested in Aboriginal ecotourism, it is necessary to overcome the identified barriers. Numerous barriers impede the development of Aboriginal ecotourism in Ontario. There are many roadblocks that have been erected by various stakeholders. There is very little support, training or knowledge-sharing in the development of Aboriginal tourism based products, despite the potential market of internal and overseas visitors that want to experience this type of tourism. It is clear that the government and external organizations need to play a certain role in helping to develop and maintain ecotourism in these communities. The individual and overall results of this survey should be taken into consideration, and ecotourism businesses should be developed with respect to the gathered understandings and perspectives to help Aboriginal ecotourism businesses in Ontario be successful and overcome current barriers.

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## ECOTOURISTS' BEHAVIOR - A STUDY IN THE BRAZILIAN MARKET

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### ABSTRACT

Marketers are studying carefully current consumption options and the criteria used by consumers at the moment of lodging buying decision. Environmentally friendly behavior, and hence the extent to which it may be predicted by demographic, psychographic and attitudinal variables, is particularly relevant for ecotourism. This research aims to analyze the Brazilian ecotourism market having in mind the perspective of demand. The study intends to explore the ecotourists' attitudes and behaviors, as well as to access their environmental awareness. The method used to collect the data was a questionnaire announced in internet. After collection, data were statistically analyzed and interpreted.

**Key Words:** ecotourism, green consumer, sustainability, Brazil

### INTRODUCTION

Ecotourism has had a relevant role in some countries' developing strategies. It is attractive due its ability to generate employment, foreign exchange and regional growth (Weaver, 1998). Countries like Brazil are trying to take advantage of its natural conditions to develop not only tourism in general, but also ecotourism in some specific areas (ex. Amazonas).

Thus, this research aims to analyze the Brazilian ecotourism market having in mind the perspective of demand. The study intends to explore the ecotourists' attitude and behavior, as well as to analyze their environmental awareness.

On one hand, the knowledge of the target market nature will allow ecotourism operators to change its marketing mix variables according to the needs and desires of the environmentally friendly tourist. On the other hand, that understanding of the ecotourist's profile will also have significant implications for managers and protected areas agencies (Wearing and Neil, 2009).

As Brazil has a great ecotourism potential, because of its rich biodiversity, this industry is seen as a logical alternative to other more consumptive forms of land exploitation. Although the evidences showing that the nature-based tourism began in Brazil in 1960, its growth has been steady. Due its importance, it was developed a code of ethics for ecotourism in 1996 and the government has been investing millions of dollars to develop this industry (Fennell, 2008).

This paper is structured as it follows. The concept of ecotourism, regarding the consumer market behavior, is presented in the literature review section. After, a brief description of the methodological aspects is shown. This is followed by the discussion of results and conclusions.

### LITERATURE REVIEW

The advent of green consumerism and the appearing of green consumer were both possible due the conjunction of three interrelated factors: the public environmentalism in the 70's, the greenness of the companies in the 80's

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and the concern with the environmental impact of the society's life-styles and consume in the 90's. The combination of these three factors motivated the discussion about the individual responsibility in the environmental crisis between experts, politicians, consumers and environmental organizations. Conscious individual actions, information and concern with environmental questions emerged as the new strategy for the resolution of the environmental problems and the development of a more sustainable society (Elkington and Hailes, 1991; Durning, 1992; Eden, 1993; Andrews, 1997; Westra e Werhane, 1998; Halkier, 1999; Stern, 1999; Paavola, 2001).

Sustainable consumption can be also applied to the field of tourism, and more specifically to ecotourism. This way, ecotourist can be defined as "people who require environmentally compatible recreational opportunities ... where nature rather than humanity predominates" (Kerr, 1991:248); usually has interest in visiting wildness, national parks, and forests, and in viewing fauna and flora, at the same time that is contributing toward conservation and benefiting local economy (Eagles, 1992).

Generally ecotourists are characterized as having higher incomes and qualifications than the average, and tend to be female (Galley and Clifton, 2004). Usually they are experienced travelers and have a college/university degree (IES, 2008). Wight (1996) refers that they tended to travel as couples, limited family or some singles, but the great difference, compared to general tourists, is in the amount they are willing to spend in the travel experience.

Fennell (2008) refers that the initial studies about the ecotourist's profile pointed that he was predominately male, well educated and with higher incomes. This was also the conclusion for instance of Wilson (1987), using a sample of 62 ecotourists in Ecuador, and of Reingold (1993) using a Canadian ecotourists' group.

Geographically speaking, the majority of ecotourists are from Western countries, like USA, Germany, Sweden, Canada and Australia (Wearing and Neil, 2009). Weaver (2006) adds that this type of tourist usually lives in developed countries, having the time and the financial resources to practice the ecotourism in less developed countries.

Along these traits, behavioral and psychographic characteristics are also used to profile the ecotourist. For instance, Ballantine and Eagles (1994), refer the possession of environmental ethic, the predisposition to conserve the resources, the focus on extrinsic motivations, the anthropocentric orientation, the desire of benefit the environment, etc. They are frequent and experienced travelers and they have preference for small groups, personalized service and outdoor activities (Wearing and Neil, 2009). Due their "science orientation", they are interested in the study, demand of information and instruction (Galley and Clifton, 2004).

Concerning to attitudes and motivations, Fennell and Smale (1992) applied a questionnaire to a sample of 77 ecotourists coming back from Costa Rica. The individuals reported as main benefits the new adventure activities, preferring outdoor attractions. The author concluded that there were differences between ecotourists and other tourists in terms of their trip-related needs and focus.

In terms of typologies or taxonomies it is possible to find a wide range of studies, as it follows. Kusler (1991) divided ecotourists into three groups: *do-it-yourself ecotourists*, *ecotourist on tours* and *school groups or scientific groups*; Lindberg (1991) used the vectors time and dedication to profile ecotourists into the *hard-core nature tourists*, the *dedicated nature tourists*, the *mainstream nature tourists* and the *casual nature tourists*; Weaver and Lawton (2002) found three groups: the *harder ecotourists*, the *softer ecotourists* and the *structured ecotourists*.

Regarding the Brazilian market, the ecotourist is characterized by his high cultural and educational level, generally has a university education degree, medium to high income and is aged between 20 and 40 years. This tourist seeks the direct contact with the nature, the exotic, the uncommon, cultures and unique environments. His daily routine is stressful, without any contact with the environment, and because of that he wishes relaxing and leisure activities. The ecotourist is aware of the fact that he is paying a superior value for environmentally friendly programs; he concerns itself with the environment preservation and with the life quality of the local community and he is able to contribute to its development, interacting or consuming there (EMBRATUR, 1994).

## **METHODOLOGY**

This study intends to analyze ecotourists' attitude and behavior, as well as to analyze their environmental awareness. Having these aims in mind, some research questions were formulated:

- Is there any relation between individuals' environmental concern and their behavior concerning ecotourism?
- Is there any relation between ecotourism practice and the concern with the conditions offered by hotels?
- Will ecotourists give preference to hotels with environmental accreditation?
- Will ecotourists prefer socially responsible enterprises?
- Will ecotourists' demographic profile be relevant to differentiate the individuals that practice ecotourism from the other individuals?

The method used to announce the questionnaire was the internet, uploading it on specialized sites of ecotourism in Brazil and networks like *facebook*, *twitter* and *orkut*. The collection of data from this kind of sites (social networks and blogs) is considered very relevant by CMIGreen (2009), to find and study the buying behaviors of green tourists. Most respondents of GMIGreen's study referred that usually they consulted sites, articles and publications containing other tourists' opinions.

The sample is composed by all individuals that visited the sites during the period of 27-04-2010 to 04-06-2010. Although the sample group was only 100 individuals, the number of visits to the questionnaire site was 502.

The questionnaire included several parts in order to measure: the general environmental concerns and behaviors; the perception about the organizational activities of social responsibility; the knowledge and practices of ecotourism; and the demographic data. This survey was previously pre-tested with a sample of 20 individuals.

After collection, data were statistically analyzed and interpreted using the statistical software SPSS 17.0 (Statistical Package for Social Sciences). A descriptive analysis was undertaken (frequencies, cross tabulations and central tendency statistics), together with nonparametric tests.

## RESULTS

The sample is mostly composed by woman, aged between 25 to 34 (36%) and 18 to 24 years old (23%). In terms of income, 19% belongs to class A and 15% of the individuals have a low income level probably because there is also a high number of students in this sample (30%). 31% of the respondents is attending some graduate course, 28% is graduated and 27% is pos-graduated.

It was performed a descriptive analysis of the questionnaire whose main results are reproduced as it follows:

- Most part of the respondents referred that they are very concerned with the environmental questions.
- In relation to the lodgings, 58% of the individuals manifested concern with environmental aspects of the same ones. The aspect more cited was "to have an efficient water management system" and "to use renewable energies".
- A significant part of the respondents referred do not knowing any environmental accreditation entity, which shows a lack of information about the issue. 41% of the ones that answered that they knew it, in fact, when they had to be more specific, their answers revealed that they actually weren't aware of the issue. However 36% of the respondents said to prefer hotels with environmental accreditation and 31% always prefer the socially responsible companies.
- Most individuals (91%) had already listen to talk in ecotourism, but only 55% practiced some connected activity, namely, trekking, nature walks, rappel and observation of animals and plants. The type of ecotourism more practiced is: Adventure (32), Recreation (29), and Flora and Fauna/Aquatic (22).
- The motivations more common were "love the nature" and "contribute to the environmental conservation".
- The website is the more used mean by the respondents to keep them informed and buy tourism products.

Next, the results that will allow us to answer to the research questions previously defined, will be presented.

*Q1. Is there any relation between individuals' environmental concern and their behavior concerning ecotourism?* To measure the individuals' environmental consciousness level, a group of questions connected with the ecological awareness was analyzed. The respondents were divided into two groups: the more environmentally conscious (they get 4 or more points in the set of seven questions, in which yes= 1 and no= 0)

and the less environmentally conscious (they get 3 or less points). The scores resulted of the sum of the number of “yes” selected in the scale provided.

The results, using the chi-square test, show that there is no statistical significance (0,709), for a significance level of 0,05. This is, the variable environmental consciousness is not relevant to differentiate the individuals concerning to the practice of ecotourism. Observing the statistical correlation between these variables, through the correlation coefficient, the conclusion is that the association is not relevant (- 0,039) (Table 1).

Table 1  
Level of environmental consciousness *versus* Practice of ecotourism

	Do you practice some ecotourism activity?		Total
	Yes	No	
Less environmentally conscious	14	11	25
More environmentally conscious	41	27	68
Total	55	38	93
Correlation coefficient.....			- 0,039
Sig.....			0,709

*Q2. Is there any relation between ecotourism practice and the concern with the conditions offered by hotels?* Observing Table 2, it is possible to say that there is a significant relation (0,001) between the variables “environmental concern with lodgings” and the “practice of ecotourism activities”. As the correlation coefficient shows, there is also a strong association between the two variables (0,99).

Table 2  
Environmental concern with lodgings *versus* Practice of ecotourism activities

When you stay in a hotel, does its ecological orientation concern you?	Do you practice some ecotourism activity?		Total
	Yes	No	
Yes	40	14	54
No	15	23	38
Total	55	37	92
Correlation coefficient.....			0,99
Sig.....			0,001

*Q3. Will ecotourists give preference to hotels with environmental accreditation?* It is possible to say that the relation between the individuals that practice ecotourism and the preference for accommodation establishments that have environmental accreditation is significant (0,004). However, the correlation between the variables is low (0,347) (Table 3).

Table 3  
Preference for environmentally accredited accommodation *versus* Practice of ecotourism activities

Do you prefer hotels with environmental accreditation?	Do you practice some ecotourism activity?		Total
	Yes	No	
Yes	28	7	35
No	4	2	6
Indifferent	23	29	52
Total	55	38	93
Correlation coefficient.....			0,348
Sig.....			0,004

*Q4. Will ecotourists prefer socially responsible enterprises?* By observing the significance value of 0,016, it could be confirmed that individuals practicing ecotourism prefer companies involved with cause related marketing and the ones that are socially responsible. However, the correlation between the two variables is low (Table 4).

Table 4  
Preference for socially responsible companies *versus* Practice of ecotourism activities

Do you prefer socially responsible companies?	Do you practice some ecotourism activity?		Total
	Yes	No	
I don't know what that means	0	1	1
Never	0	2	2
Sometimes	32	29	61
Always	23	6	29
Total	55	38	93
Correlation coefficient.....			-0,326
Sig.....			0,016

Q5. Will ecotourists' demographic profile be relevant to differentiate individuals that practice ecotourism from other individuals? In this case a bivariate analysis was undertaken, in which various cross-tables were carried out, between the variables "practice of ecotourism" and "demographics" (Table 5). Regarding the significance of demographic characteristics in the differentiation of the two groups, a Pearson's test was performed, and it allows us to say that statistical significance exists just in the case of variable age. However the correlation coefficient presents low values for all variables.

Table 5  
Correlation Coefficient and Significance

Variables	Sig.	Correlation Coef.	N
Gender	0,312	-0,105	89
Age	0,045	0,109	89
Monthly income	0,367	-0,155	89
Level of education	0,146	0,107	89

These results seem to differ from the ones achieved by Wearing e Neil (2009) that refer that ecotourists usually exhibit higher incomes. However the results are according with the ones of the research performed by EMBRATUR (1994), in the Brazilian market, concluding that the ecotourist is characterized by a high cultural and educational level.

## CONCLUSIONS

Regarding consumer market, ecotourism seems to be a familiar term for most respondents. However, this tourism is not promoted or communicated enough. The market of environmental tourism practitioners has been gradually growing due the increase of environmental concern in last years. Environmental consciousness is present in these respondents and the relation between environmental consciousness and practice of a more sustainable tourism is significant.

As limitations of the study, the sample dimension can be pointed, by which some results should be analyzed with caution.

As future research, we can indicate the study of other ecotourists' characteristics as lifestyles or values, as well as the research of firms' perceptions of the market. Another idea that could be explored is the research of ecotourists during the period of the travel, this is, to realize an *in locostudy* which would allow us to clearly understand the motivations of these tourists.

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# CONCEPTUAL FRAMEWORK OF ENVIRONMENTAL VALUES IMPORTANCE IN SUSTAINABLE TOURISM AND ECOTOURISM (CASE OF CAMILI BIOSPHERE RESERVE AREA IN TURKEY)

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## ABSTRACT

The case study area, Camili Biosphere Reserve; the sustainability of forest resources with ecotourism activities and developed for control with management stage at the development of the forest villagers. The important of natural environment, similarity between sustainable tourism and ecotourism. Necessity of realization with a sustainable approach to ecotourism activities. Forest villagers are selected according to full-count method. Questionnaires included forest villagers' personal information, social- economic effects of ecotourism activities and destruction of the environment like these variables were inquired both before and after the ecotourism activities. Data will be analyzed through descriptives, Chi-Square, paired T tests, and Wilcoxon analysis.

**Key Words:** Ecotourism-Sustainable Tourism-Environment

## INTRODUCTION

Today, tourism activities are an event involving as producer and consumer millions of people. Tourism is an essential sector of the economic, socio-cultural and environmental impacts directly and indirectly linked to the sector due to the addition of many countries (Sarkim, 2008). Tourism and the environment benefit from a double-sided. That is natural, historical and cultural values, preservation of the environment aren't taken into account when the importance of tourism planning, the physical size becomes a polluting. Thus; in tourism, environmentally sensitive approach to tourism and natural resources protection concepts and new searches have been debate becoming more important on the agenda with the sustainability (Kuter and Unal, 2009).

Sustainability are activities to protect natural resources while meeting the needs of today and future generations a good environment (Collin, 2004). In this context, sustainable tourism has emerged the source of tourism in the natural, cultural, historical resources and environmental protection, use and preservation of these resources for future generations to benefit from tourism (Sarkim, 2008).

Sustainable tourism contains social responsibility, economic efficiency and ecological sensitivity and trying to make them compatible with each other at every stage. Host country must be without damage which the natural, historic and cultural resources, essential ecological processes, biological diversity and the protection of species and ensuring its sustainability for ensure a sustainable development in tourism (Liu, 2000). In other words, it distributions to economy and society and requires the sustainable use of all resources and the environment.

Ecotourism which is one of the forms of sustainable tourism protections to natural, environmental and socio-cultural resources and to minimize losses and one of the best ways both today and future resources to enable the continuity and sustainability. International Ecotourism Society (TIES) 's ecotourism identified as protects environment and improves the well-being of local people and responsible travel to natural areas. IUCN defined as "to each of the past and the future of cultural traits associated with the protection of the developing low-impact visitors, local people's active socio-economic participation, to enjoy nature and of nature in order to realize the value of environmentally responsible travel to natural areas". Ecotourism which active role in ensuring sustainable development is the most appropriate form of tourism. If it carried out as intended, it had developed in the natural and cultural areas the protection of sensitive ecosystems and living in the vicinity of these regions and within the economic and socio-cultural development of the forest resource which can contribute to a significant factor. Forest villagers who constitute the poorest segment of society increases revenues. Ecotourism is an important tool at forest (Yürük, 2005).

Ecotourism activities which forest areas as planned natural areas, especially to reduce the environmental destruction of natural areas and provides revenue to forest villagers in these areas. This aspect of ecotourism should be sensitive to protect the environment, sustainable, economically efficient and socially responsible. In the ecotourism areas may occur positive results for planning and conservation goals. Therefore, eco-tourism

activities, what and for what reason, how much, how and under what conditions, for whom and by whom should be preserved and maintained and determine the dimensions of change (Beyhan and Ünügür, 2005).

This paper; recommendations have been developed for the management and control at the Artvin-Camili which to introduce the potential eco-tourism, the importance in terms of sustainable tourism of the natural environment, requirements and similarities with ecotourism and environmental values of the concept of sustainable tourism for sustainability of forest resources and development of forest villagers.

## MATERIAL AND METHOD

### Material

In the case study area has been investigated economic and environmental at the the concept of ecotourism with the framework of sustainability. In the case study area, Camili Biosphere Reserve, is at the northeast part of the Turkey in Artvin, at the Georgia-Turkish border. Six unit forest villages implemented the Camili with GEF-II project records, TEMA foundation, a project conducted in the operating principles, both GEF-II as well as TEMA managers made interviews and participation in ecotourism activities villages on the questionnaire are used as material.

### Method

Primarily as a reach group, with in the ecological, economic and socio-cultural representation to each of three criteria that may have decided to carry out research in six villages. After that goal will serve in villages for ecotourism activities in the context of participants is low due to inquiry questionnaire to implement the villagers' choice, the first headman, village elders and boarding house keeper were chosen. Then the guidance of these people were apply with census method. In this way, 61 people who participating ecotourism activities in the case study area were contact. All those aspects were inquired both before and after the ecotourism activities. Data will be analyzed through descriptives, Chi-Square, paired t tests, and wilcoxon analyses.

## ANALYSIS

### Related to Information Levels with Ecotourism Activities Analysis

Before ecotourism activities "What did you think about eco-tourism?" for the question forest villagers %78.7 no opinion, %8.2 tourism which understands and explains the nature, %3.3 to earn more revenue, reflecting the cultural values of local people in tourism and protecting to forest resources, % 1.6 environment-friendly tourism; after ecotourism activities "what does ecotourism mean?" for the question % 45.9 more tourism revenue provide, % 26.2 both environment protect and well-being of local people provide, % 9.8 reflect the cultural values of the local people, % 8.2 guards and protecting the forest resources, % 6.6 do more production, % 1.6 tourism which understands and explains the nature and both myself and the organizers to earn more revenue from tourism has given of answers.

"Which do you do to provide additional income and to contribute to the development of ecotourism?" for the question forest villagers % 56.7 honey sell, % 33.3 of ecotourist guidance, % 20 pansion, % 16.7 local foods and crafts marketing, % 15 transport, % 1.7 conserve and pectin sell have said.

These values are among the statistically significant difference whether the test in Table 1 as seen between two groups, with the significance test of the difference between two identical meaning of the term test results; %95 confidence level causes differ in that (thesap= 10.623 p<0.05) were determined.

Table 1. Before and after ecotourism activities "What does ecotourism mean?" different with the T test results

	Paired Differences				T	(df)	(Sig. Level)	
	Mean	Std. Dev.	Std. Error Mean	%95 Confidence Interval of The Difference				
				Lower				Upper
ekoönce – ekosonra	4,934	3,628	,465	4,005	5,864	10,623	60	,000

### Socio-Economic Impacts of Ecotourism Activities Analysis

Forest villagers who attending to activities ecotourism, before eco-tourism activities, % 59 permanent, while % 41 temporary; after ecotourism activities, % 65.6 permanent, % 34.4 temporary have been identified. While

depend of ecotourism at increased permanent stay in the villages, as inversely proportional to it, in case of temporary residence declined to show it can be said to occur.

After ecotourism activities average revenue 7097.87 YTL have been identified while before ecotourism activities average revenue 3245.90 YTL paired T test was applied to statistical significant difference between these values. These values are among the statistically significant difference whether the test in Table 2 as seen between two groups, with the significance test of the difference between two identical meaning of the term test results; %95 confidence level causes differ in that (thesap= - 6, 227, p<0.05) were determined.

Table 2. Before and after ecotourism activities revenue supply different with the T test results

	Paired Differences					T	(df)	(Sig. Level)
	Mean	Std. Dev.	Std. Error Mean	%95 Confidence Interval of The Difference				
				Alt	Üst			
ekoönce – ekosonra	-3851,967	4830,980	618,544	-5089,239	-2614,696	-6,227	60	,000

According to this result, ecotourism activities have been identified to increase of revenue. However, much of the revenue sources is beekeeping and ecotourism activities. Although agriculture, animal husbandry and trade, it has been observed different by others. At these results, additional revenue has effect of ecotourism. "Do you think you keep additional revenue from ecotourism?" for the question, forest villagers % 88.5 yes and partial have been answers. At the various eco-tourism activities examined; while before ecotourism activities per average beehive number 32.11, after ecotourism activities per beehive number 76.22 have been identified. These values are displaying a normal distribution. So, wilcoxon test was applied. These values are among the statistically significant difference whether the test in Table 3 as seen Wilcoxon test results; %95 confidence level causes differ in that (Zhesap= - 2, 097, p<0.05) were determined. Namely; to before ecotourism activities, per capita average beehive were increased.

Table 3. Before and after ecotourism activities per capita beehive number exchange Wilcoxon test results a.ESKS<EÖKS b.ESKS>EÖKS c.ESKS=EÖKS

		N	Average Rank	Total Ranks
ESKS-EÖKS	Negative Ranklar	14 <sup>a</sup>	21,39	299,50
	Pozitive Ranklar	29 <sup>b</sup>	22,29	646,50
	Link	2 <sup>c</sup>	-	-
	Total	45	-	-
ESKS-EÖKS				
Z		-2,097 <sup>a</sup>		
Mean Levels		,036		

While before ecotourism activities per capita average production at conserve, jam, pectin annually average 13.52, after ecotourism activities per capita average production at conserve, jam, pectin 18.85 have been identified. These values are among the statistically significant difference whether the test in Table 4 as seen between two groups, with the significance test of the difference between two identical meaning of the term test results; %95 confidence level causes differ in that (thesap= -3, 856, p<0.05) were determined.

Table 4. Before and after ecotourism activities different per capita average production at conserve, jam, pectin annually average with the T test results

	Paired Differences					T	(df)	(Sig. Level)
	Mean	Std. Dev.	Std. Error mean	%95 Confidence Interval of The Difference				
				Alt	Üst			
ekoönce – ekosonra	-5,328	10,792	1,382	-8,092	-2,564	-3,856	60	,000

Also; while before ecotourism activities per capita average production for local skilled trade 15.45 item, after ecotourism activities per capita average production for local skilled trade 37.55 item have been identified. These

values are displaying a normal distribution. So, Wilcoxon test was applied. These values are among the statistically significant difference whether the test in Table 5 as seen Wilcoxon test results; %95 confidence level causes differ in that (Zhesap=-2,940, p<0.05) were determined.

Table 5. Before and after ecotourism activities per capita average production for local skilled trade Wilcoxon test results

		N	Average Rank	Total Ranks
ESYM-EÖYM	Negative Ranklar	0 <sup>a</sup>	,00	,00
	Pozitive Ranks	11 <sup>b</sup>	6,00	66,00
	Link	0 <sup>c</sup>	-	-
	Total	11	-	-
ESYM-EÖYM				
Z		-2,940 <sup>a</sup>		
Mean Levels		,003		

### Environmental Impacts of Ecotourism Activities Analysis

After ecotourism activities in the region problems, percentages, % 86.9 off the roads in winter and to provide transportation from Georgia, % 52.5 education / health problems, % 24.6 power cut, % 23 failure of the revenue, % 11.5 failure of village road, % 6.6 scarcity of animal and agricultural products, % 1.6 communication and water problems; before ecotourism activities in the region problems, % 85.2 off the roads in winter and intercommunication from Georgia, % 49.2 education/health problems, % 9.8 lack of revenue due to power cut and % 6.6 failure of the village road have been identified as a problem. These values are among the statistically significant difference whether the test in Table 6 as seen between two groups, with the significance test of the difference between two identical meaning of the term test results; %95 confidence level causes not differ in that (thesap=2,497, p>0.05) were determined.

Namely, as a result at the significance of the difference between two identical test was great the significance level of 0.05. Problems of region not difference before and after ecotourism activities. However, problems in the region still continue today, in the amount of the problems don't happen the decrease. In other words; ecotourism activities, has had an impact in reducing these problems. Because ecotourism activities in the region increased with revenues. Thus problems in the region have occurred a decrease. As a result of ecotourism activities "Has ecotourism ever been effective in solving the existing problems in region?" for question forest villagers, % 26.2 yes, % 42.6 partly, % 31.1 no has the answer. Again, "Had an effect in increasing the quality of ecotourism Borcka-Camili highway?" forest villagers, % 19.7 yes, % 34.4 partly, % 45.9 no has the answer. As a result; in the eco-tourism activities areas, both of socio-economic aspect and environmental aspect must be taken. Therefore, assessment of environmental impact should be considered.

Table 6. Before and after ecotourism activities exchange which between existing problems in the region with the T test results

		Paired Differences				T	(df)	(Sig. Level)	
		Mean	Std. Dev.	Std. Error Mean	%95 Confidence Interval of The Difference				
					Alt				Üst
ekoöncesi	-	57,016	178,343	22,834	11,341	102,692	2,497	60	,015
ekosonrası									

"To today, what the most important negative impact of ecotourism activities on the environment?" for the question forest villagers % 8.2 problems of forest destruction and land-use, % 3.3 prohibition of hunting and destruction of agricultural land, % 41 pollution of streams, % 11.5 of soil and plant damage, % 23 waste cause problems have seen. "What the most important negative impact of ecotourism activities on the environment?" answers the amount of difference between whether the purpose of determining the Chi-Square test results; people difference between that have been identified (Chi-Square amount= 24.984, p<0.05).

Moreover, after ecotourism activities per capita annually firewood numbers 13.52 ster while before ecotourism activities per capita annually firewood numbers 13.93 ster. These values are among the statistically significant difference whether the test in Table 8 as seen between two groups, with the significance test of the difference between two identical meaning of the term test results; %95 confidence level causes not differ in that (thesap=,882, p>0.05) were determined. According to this result, today eco-tourism activities has decreased the amount of wood used for fuel. In fact, this situation doesn't mean that there is influence on the forests villagers.

Table 7. Negative impacts of ecotourism activities on the environment of Chi- Square test results

Variables	Observed N	Expected N	Residual
Hunting	2	12,2	-10,2
Destruction	10	12,2	-2,2
Loss of ground	8	12,2	-4,2
Waste material	16	12,2	3,8
River pollution	25	12,2	12,8
Total	61		
		Negative Impacts	
Chi-Square	24,984 <sup>a</sup>		
Df	4		
Asymp Sig.	,000		

Table 8. Before and after ecotourism activities per capita firewood with the T test results

	Paired Differences					T	(df)	(Sig. Level)	
	Mean	Std. Dev.	Std. Error Mean	%95 Confidence Interval of The Difference					
				Alt	Üst				
eko önce ekosonra	–	,410	3,630	,465	–,520	1,340	,882	60	,381

### 3. CONCLUSIONS AND IMPLICATIONS

The positive economic effects of ecotourism; increase employment opportunities for local people and supply additional regional incomes (direct revenue from ecotourism activities; pensions with local skilled and art). Therefore, eco-tourism areas must require to increase diversity. For example, at the market area have consisted of local skilled trade. However, this amount isn't enough. Variety of local skilled trade may to enriching. So, it may select promoting and supporting. Such activities should be activated such as training courses and more participation of women at the region.

Both environment-related organization and basic services such as road-debris and water garbage becomes problems. For this, it should be made the country's legal regulations, development plans, specifications of regions and natural environment. Ecotourism should be protected for natural and cultural heritage and rural development. For the sustainability of ecotourism, planning, management and monitoring activities should be determined on the methods. Local people should be given priority. The local people most affected to ecotourism should be aware of any positive or negative effect. Ecotourists should be made about ecosystem of the region, local cultures and sustainability.

Camili not only national but also an area of international importance. Camili which Turkey's first and only Biosphere Reserve Area economic activity in the technical sense, varies from 1990 to the present day, especially honey, queen bee and bee products are experiencing price increases for products been understood such as production and reflected in revenue. Ecotourism; conservation of biological diversity, economic development and the protection of cultural values-oriented applications, tested, selected is presented and developed areas. This property of ecotourism must be protected in a continuous manner. But that is observed in the area was damaged in various environmental. Therefore, the effectiveness of ecotourism as a criterion to evaluate economic rather than only for forest villagers; ecological aspects should be considered and destroyed the natural environment. Therefore, countries and regions must be determined eco-tourism potential and in the ecotourism should be considered balance of protection-utilization. Ecotourism activities with environmental senses should be provided culture and the spread of protectionism.

Forest villagers who pensions aren't use electricity or wood as a source of energy. They are use propane, gas, oil, solar or wind energy. Lack of enough water systems through the house can produce less waste. Thus, environmental destruction can keep to a minimum.

The main weight of responsibility for forest villagers isn't only the forestry sector from loading. Forest villagers with all relation groups should be provided solidarity. Other public institutions, civil society organizations and

local governments must responsibility in this area. Coordination and cooperation between different institutions should be provided. Civil society organizations and unit of administration should be established in order to generate new solutions at ecotourism areas. People of central control should be concious people. Thus, forest villagers who research in the field, with the main principles administrators, decision-making process should follow and the concept of participatory approach, and administrative responsibility. Therefore the execution of work should be left to experts. However control mechanism, originally forest managers and villagers who they create the foundation of mutual trust and love can be seen as the most efficient and permanent solution.

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## ESTABLISHING CARBON NEUTRALITY INDICATORS OF TOURISM DESTINATION USING ANALYTIC NETWORK PROCESS (ANP) APPROACH

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### ABSTRACT

With the impact of global warming, Energy-Saving and Carbon Reduction (ESCR) has become an important issue. A set of ESCR indicators will be helpful for the management and control of destinations. This study is comprised of three sub-studies. The first sub-study adopted qualitative methods including content analysis and expert interview to construct 35 ESCR indicators of nature destinations. The second sub-study adopted Analytic Network Process (ANP) to conduct relative weight analysis of the indicators. The third sub-study further developed the indicators into field survey questionnaire. Finally, suggestions are proposed for the application and further research of these indicators.

**Key Words:** Energy-Saving & Carbon Reduction, Low Carbon Tourism, Sustainable Tourism, Natural Destination Management.

### INTRODUCTION

It is argued by many that global warming and the effect of greenhouse gases pose a serious environmental threat worldwide, not to mention the sustainable development of the tourism and hospitality industry (Dubois & Ceron, 2006). In the case of the tourism industry, many activities rely heavily on natural resources, despite the environmental and climatic changes that have already adversely impacted mountains, seashores and lakes, deserts, and polar regions. For example, sea warming has devastated coral reefs in tropical climates (Cunliffe, 2002). Given the growing incidence of exposure to harmful radiation when sunbathing, beachgoers are increasingly concerned when choosing tourist destinations (Hamilton et al., 2005). As global warming adversely impacts development of the tourism industry, so related activities continue to produce greenhouse gases, changing not only the relation between tourism and global warming, but also prompting a growing awareness in the tourism industry and related public sectors of environmental protection and sustainable tourism-related issues (Dolnicar & Leisch, 2008; Roberts & Tribe, 2008; Tsaur & Wang, 2007). The Davos Declaration, passed at the 2nd International Conference on Climate Change and Tourism, highlighted how climate change and the tourism industry are connected. It is estimated that the tourism industry generates 5% of all carbon dioxide emissions, of which, aviation account for 75%. As tourism is definitely linked to global warming, specific measures and practices should be adopted to mitigate greenhouse gas emissions linked to tourism. (UNWTO, 2008).

In order to slow down global warming, countries have been proposing counter-measures and projects, such as the PAS2060, proposed by the British Standards Institution (British Standards Institution, 2009). In Taiwan, the Executive Yuan passed the "Guidelines for Sustainable Energy Policy – An Energy-Saving and Carbon-Reduction Action Plan," which proposed concrete ESCR measures in five domains (energy, industry, transportation, environment, life). With related sound laws and regulations, "Energy-Saving & Carbon Reduction" became officially a slogan for environmental protection. In terms of energy-saving, the goal was to



improve the energy efficiency by 2% every year, and drop energy intensity levels to 20 percent of 2005 levels by 2015. And in terms of carbon-reduction, the goal was to lower the emission of carbon dioxide to 2008 levels by 2016-2020, and to 2000 levels by 2025. Industries have also been encouraged to implement measures for ESCR (Taiwan Executive Yuan, 2010). Accordingly, this study attempts to develop ESCR indicators for nature destinations, e.g., national parks, forest recreation areas and natural scenic spots, to aid management practices and combat global warming.

## **METHOD**

### **1. Sub-Study 1: Establishing Energy Saving and Carbon Reduction Indicators**

This study investigates qualitatively ESCR topics, focusing mainly on in-depth interviews, a field observation and content analysis. Based on the use of grounded theory, means ESCR in the tourism industry is identified to develop ESCR indicators of a nature based destination. 17 participants interviewed included governmental, industrial, and academic experts. In addition to interviews, this study also adopted field observations at two travel destinations: a representative low-carbon travel destination and an officially-approved eco farm.

The essence of ESCR in a nature based destination was categorized and analyzed before a conclusion was reached. Reliability and validity of the qualitative analysis were ensured based on triangulation. Multiple documents (e.g., observation notes and interview records) were cross-analyzed, and the analysis results were also cross-examined with research partners and peer instructors.

### **2. Sub-Study 2: Prioritizing ESCR indicators via ANP**

After the literature review and qualitative study were conducted in sub-study 1 to construct the ESCR indicators for nature destinations, this following sub-study 2 adopted Analytic Network Process (ANP), proposed by Satty(1996), to conduct expert questionnaire survey, so as to confirm the significance of each indicator and explore the relative weights of the indicators. This study invited 14 experts in total for ANP, including scholars in sustainable ecology tourism and environmental education, industry experts in ecology tourism, NGO representatives, and government officials in related departments.

Based on the indicators developed by the qualitative study in sub-study 1, the “Expert questionnaire for ESCR at tourism destinations” was developed for ANP. The responses to the questionnaires were processed according to the suggestions of Saaty: data from different experts were integrated using the geometric mean, and analyzed by model construction and problem structuring, constructing pairwise comparison matrices of interdependent component levels, supermatrix formation, and prioritizing and selecting alternatives.

### **3. Sub-Study 3 Field survey in natural destination with ESCR indicators**

In order to examine the applicability of the ESCR indicators developed by this study, and to actually use the indicators to evaluate the ESCR achievements at nature destinations, the third sub-study invited four nature destinations to conduct trial evaluations to ensure that the indicators are practical and can serve as a reference when the operators wish to undertake ESCR.

The four nature destinations included in sub-study 3 were Pinglin Township, Albe Eco Farm, Yangmingshan National Park, and Flying Cow Ranch. After using the ESCR indicators to conduct trial evaluation, this study conducted weighted scoring according to the weight ratio acquired by ANP. Descriptive statistics was used to show the practice of ESCR at nature destinations and confirm the applicability of the ESCR indicators.

## **RESULTS AND DISCUSSION**

### **1. Qualitative analysis for ESCR indicators**

Based on the contents analysis and qualitative interviews were conducted in order to explore the specific ESCR indicators of nature destinations. The indicators can be divided into the above 5 domains and 7 dimensions. [Table1](#) lists 35 indicators of ESCR.

### **2. The weights of the ESCR indicators**

In order to confirm the relative weights for the ESCR indicators through ANP, firstly the interdependent relationships among the indicators must be considered. The researchers assumed that the dimensions and indicators are mutually independent, and through literature reviews and interviews, it was preliminarily concluded that the indicators are internally and externally interdependent. Therefore, ANP was used to develop the relative weights of the indicators with dependent relationships. After the inter-relationships among indicators

were confirmed, this study further evaluated their pairwise comparison matrices. The consistency ratio (CR) was calculated to ensure the consistency among different evaluators, and the results showed that the CR values in seven dimensions were lower than 0.1, meaning that the evaluations were consistent and reliable. The next step was to construct a supermatrix by comparing the maximum eigenvalues and corresponding eigenvectors in pairs. When constructing the supermatrix, the Column Stochastic principle must be considered. If the supermatrix doesn't meet the requirements, the evaluator must convert it into a weighted supermatrix M. After the limitations of the weighted super matrix, the limiting super matrix M\* was derived

Table 1 ESCR Indicators of Nature Destinations

Domain	Dimension	Indicator
Nature	Natural Scenery (NS)	1. Using native tree species for regeneration or implementing natural regeneration
		2. Adopting forestation and greening at appropriate non-forest places
		3. Regenerating native, endangered, and/or endemic species
Facility	Facilities & Equipments (FE)	1. Using environmental engineering for constructions at destination for integrating with the environment
		2. Using alternative energy facilities (including solar power, wind power, etc.)
		3. Adopting sustainable building materials and green building design
		4. Adopting energy-saving devices and measures
		5. Adopting water-saving devices (e.g. faucets and toilets with energy labels)
		6. Implementing wastewater recycling, cleaning and reuse
Traffic	Traffic facilities (TF)	7. Producing less waste by practicing the "3 Rs:" Reduce, Reuse, Recycle.
		1. Adopting electric car and alternative green energy
		2. Improving energy efficiency of transportation tools
	Traffic planning (TP)	3. Using transportation tools whose emission comply with environmental requirements
		1. Arranging tour buses for carbon reduction tours
		2. Providing shuttle services linking mass transportation systems
		3. Planning supporting measures for users of mass transportation system to take bicycles along
4. Specifying car-free areas		
5. Planning biking lanes to encourage biking instead of taking motor vehicles		
6. Improving passenger load factor of transportation tools		
7. Providing transfer information and guidance		
Activity	Design & arrangement of activities (DA)	1. Reduce the percentage of electric entertainment facilities that use fossil fuel
		2. Providing tourism activities of low energy consumption (e.g. sightseeing, cultural experiencing, etc.)
		3. Arranging low mileage short trips
		4. Planning eco-friendly itineraries
		5. Providing carbon emission factors of tourist activities, as well as carbon reduction projects
		6. Avoiding entertainments of high carbon emission level (e.g. fireworks, BBQs, car parades)
Management	Business policy & management (BM)	1. Monitoring energy consumption of all facilities
		2. Providing staff training on energy and environmental education
		3. Establishing detailed environmental policies and indicators
		4. Evaluating and reviewing the environment regularly
		5. Implementing carbon reduction and clean production mechanism
	Consumer management & education (CE)	1. Adopting flexible rates to charge user fees for facilities of high ESCR
		2. Selling carbon credit coupons that facilitates carbon offsets through tourist consumption
		3. Providing illustration and promotion on energy saving and environmental protection
4. Establishing environment protection rules and regulations for tourists		

Table 2 shows the relative weights of the ESCR indicators and seven dimensions by using ANP method. The dimensions of the highest weights are "Business policy and management" (25.81%), "Traffic planning" (21.46%), and "Facilities and Equipments" (15.01%), followed by "Design and arrangement of activities" (14.58 %), "Traffic facilities" (8.95 %), "Natural Scenery" (7.67 %), and last, "Consumer management and

education” (6.51 %). The results of the analysis revealed that the key factors to practicing ESCR at nature destinations are the attitude and beliefs of managers and operators, as well as the value they hold toward their operation. The importance of “traffic planning” echoes to the fact that, as the literature showed, transportation is a major source of carbon emission, and the key to reducing carbon footprint of tourists. As for the dimension of facilities and equipments, it covered the aspects of water and electricity usages, whose measurements can be easily converted into carbon emission for the small and medium organizations to refer to when monitoring and controlling their ESCR practices.

Table 2 Weightings of ESCR dimensions and indicators

Dimension	Indicator	Dimension weight	Indicator weight
Natural Scenery (NS)	NS-1	7.67 %	0.040
	NS-2		0.017
	NS-3		0.019
Facilities and Equipments (FE)	FE-1	15.01%	0.016
	FE-2		0.017
	FE-3		0.032
	FE-4		0.029
	FE-5		0.017
	FE-6		0.019
	FE-7		0.016
Traffic facilities (TF)	TF-1	8.95 %	0.038
	TF-2		0.038
	TF-3		0.012
Traffic planning (TP)	TP-1	21.46%	0.066
	TP-2		0.046
	TP-3		0.034
	TP-4		0.020
	TP-5		0.014
	TP-6		0.013
	TP-7		0.018
Design and arrangement of activities (DA)	DA-1	14.58 %	0.020
	DA-2		0.037
	DA-3		0.015
	DA-4		0.038
	DA-5		0.016
	DA-6		0.017
Business policy and management (BM)	BM-1	25.81%	0.029
	BM-2		0.063
	BM-3		0.063
	BM-4		0.042
	BM-5		0.058
Consumer management and education(CE)	CE-1	6.51 %	0.029
	CE-2		0.010
	CE-3		0.014
	CE-4		0.010

### 3. Survey results in natural destination

With qualitative methods and ANP, this study developed and confirmed the ESCR indicators for nature destinations. In order to examine the applicability of the ESCR indicators and to conduct preliminary evaluations of ESCR practices at nature destinations in Taiwan, the study invited four nature destinations to conduct trial evaluations, Generally speaking, the four destinations scored highest in the dimension “Design and arrangement of activities” and lowest in “Business policy and management.” However, the ANP discovered that “Business policy and management” actually bears the highest weight and should be improved first. As for the other dimensions, scores for “Traffic facilities” and “Traffic planning” were also lower, and “Traffic planning” is another dimension that is important but not performing well. It is a problem that should be noticed.

### CONCLUSIONS

This study constructed ESCR indicators of nature based destinations for 5 domains, 7 dimensions, and 35 indicators. The indicators were further explored with ANP to find out their relative weights, and their

applicability was also confirmed by trial evaluations conducted at four nature destinations. For the industry, the ESCR indicators would facilitate the implementation of ESCR practices in its daily operations and management. The study also adopted quantitative methods and trial evaluation to demonstrate the importance and weight of each indicator, turning the indicators into an effective means of evaluating tourism destination. The operators and managers of nature destinations can use the indicators to self-evaluate their ESCR practices and strong/weak points for further development. Furthermore, the evaluation approach can be adopted to establish a mechanism for certification, which would again encourage more operators to implement carbon neutrality practices. Consumers can also select scenic spots that comply with related regulations.

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# ANALYZE AND EVALUATE OF POTENTIAL & STRATEGIES FOR ECOTOURISM DEVELOPMENT IN KAVIR NATIONAL PARK

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## ABSTRACT

Iran is located in orbits between 25 to 40 degrees in north latitude. Of 164 million - hectare Area of Iran, 43 million hectares is formed of deserted land. Kavir National Park is located in the middle of Kavir desert as a Geotourism region. This park with having typical geomorphologic effects, salt polygons and part of salt lake and also tourist attractions such as sportive, historical, scientific, industrial and diversity in soil plants and animals,... indicate a high capability in it. this article is going to access capabilities and limitations of geotourism to edit the best strategy for improving tourism performance management. in this content the SWOT strategy that is based on indentifying the strengths and weaknesses of (internal factors)and opportunities and threats of (internal factors) has been used and the licarte spectrum was used to take advantage and rank of inner environmental factors and outer environmental factors, then offered the solutions SO, WO, ST, WT . results of analysis shows that the most important strengths, weakness, opportunities and threads in the region, respectively, including natural and geomorphologic attractions, geographic location, special attention to Kavir National Park, climate, advertisement, lack of facilities, budget, tourist available services, lack of accessible roads to the area, changes to the historical and natural monuments, job creation, transportation technology, industrial use of the desert. the obtained average of the analysis and strategy factors (3.1), represents the high capacity of the region in tourism attraction.

**Keywords:** Tourism, Geotourism, Kavir National Park, SWOT.

## INTRODUCTION

A friction of 2.3 Iran's area belongs to the dry lands and deserts (Jedare Eyvazi, 2004, 10). From the particularities of these dry lands and deserts, the existence of geomorphological features as strange potentials for the attraction of tourists, are accounted for. However, despite the existence of these potentials, the existence of barriers and numerous limitations, the expansion of ecotourism within these limitations have faced with difficulties. So that, the development of this industry at the expense of these limitations, and fulfilling the developing needs of it, are accounted for ( monshizadeh, 2005,56).

National desert park as a part of Iran's lands, has the attractions of special geomorphological is an example of the resulted features form the excavational activities and wind density in the areas of humid and swallow eel surfaces, tilled areas, salty polygon, parts of the salt lake, the existence of tourist attractions such as sporting, historical (Gashr-E-Bahram carvansari ),scientific industrial and the variation of good soils, and special plants of the areas, the coordinating animals with these environment and.... One of the unique spaces from Iran, are accounted for, so that in order to study and particularize the tourist attractions from it and necessary programming in this particular sense, the potential for changing into an area of extraordinary ecotourism, have been accounted for. This area in the year 1964, by the hunting society of Iran, with an area of 609.438 thousands hectares have been under preservance and in the year of 1976 has been changed into a national park and its area has reached to 670000 thousand hectares.

The studies of tourism and ecotourism do not have long background in the world. It can be mentioned to some of the works of persons Edward Inskip(1991), Bonifes(2001), Clare Gun(2002), David Wearer & Laura J.Lawtona(2007), Stephan Wearing & John Neil (2009), Mori Gary(2007), Dowling & Newsome(2006),Golkar(2005), Noori(2006), Nohegar (2009).

The management of nature travelling with the technique of SWOT is relatively a new technique that at this time has been used across the world. goals of this survey can be explained as follows:

- Assessing the total abilities and developing opportunities testing of ecotourism in the national desert park.
- particularizing the problems and barriers, the goals and policies of tourism in an order to be of paving way for the activities in this field.

## THE GEOGRAPHICAL LOCALITY OF NATIONAL DESERT PARK

The desert land is the largest in Iran. This desert between the provinces of Khorasan Razavi, Semnan, Yazd, Tehran and central has been situated. This area is a set of a peninsular that is located between the salt lake, gravel desert, central desert and Garmsar desert and is an explicit example of deserts and steps of low water reserves. This desert with the approximate length of 800 KM and width of 320 KM is accounted for. The national desert park is a part of this desert, that has been situated at 51°23' to 53°04' east length and 34°17' to 35°12' north length within Semnan district ( figure No.1). The area of this park is 446400 hectares. The salt lake which is the only lake that has been situated adjacent to the park is one of the biggest of salt lakes of Iran. This lake has a triangular shape which its top is in the north, and the area of the lake is nearly 2500 square Kilometers and until the west boundary antiques.

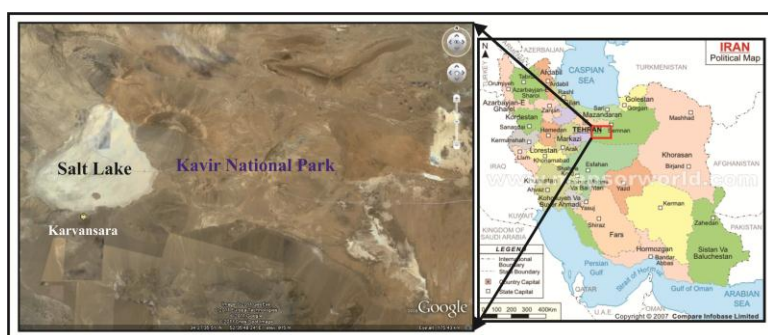


Figure 1: Position the study area

## MATERIALS AND METHODS

The programming of tourism and its developing is a group paving way implication that needs for a strategic programming. This order with the use of analyzing techniques and conscious decision makings and clear, has been formed. One of the techniques that today can be used is by the SWOT style ( Nohegar,2010, 4). The present survey in order for analyzing of the strong points, and disadvantages and opportunities and threats with the technique of SWOT has been implemented, and ultimately with adopting these factors together, four strategies have been formed:

1. Strength- Opportunities(SO)
2. Strength- Threats (ST)
3. Weakness- Opportunities(WO)
4. Weakness- Threats(WT)

Have been displayed. These strategies in order to utilize from the strengths and opportunities of this area for removing the weaknesses and threats in the direction of developing in the area. The implications of massive strategies, in three stages, have been compared and decisions are made.

The first stage consists of analyzing matrix of internet factors and of external factors. In the second stage is the comparing with the SWOT matrix of strategies. In this survey, for editing of massive tourism of the area from two matrix of threats, and weaknesses, strengths and assessing of the external and internal factors have been used. In the third stage which is the decision making and the gained strategies within the comparing stage has been analyzed and then with the use of instrumental by the name of matrix and programming of **Quantitative Strategic Planning Matrix** (QSPM) have been prioritized.

## THE RESEARCH FINDING

Within the first stage of inputs, after the surveying with the style of Delphi, the view points of experts within the tourism in the strength, weaknesses, and threats and tourist opportunities in the national desert park, a co-efficient ( the level of importance in the tourist industry), and its place (the level of its importance of these factors, in tourism in the national desert park), have been gathered and ultimately, the set of advantages of them have been accounted for ultimately, the analyzing matrix of external and internal factors (Table No. 1 and 2) have been extracted.

Table 1: the analyzing matrix of the external and internal factors ruling open the national desert park (Internal factor analysis summary)(IFAS)

Description	Final score	Rated	Coefficient	Internal factors
Government declared protected national park and it has paid special attention	0.32	4	0.08	S <sub>1</sub> special attention to the Desert National Park
Laws banning hunting, conservation area. . .	0.1	2	0.05	S <sub>2</sub> current environmental laws in the region
Access is provided for all Iranians.	0.21	3	0.07	S <sub>3</sub> located at the geographic center of Iran
R. qualitatively educated people more than other people in the ads are effective	0.15	2.5	0.06	S <sub>4</sub> according to people aware of tourism
Close to the capital = to attract more tourists	0.12	2	0.06	S <sub>5</sub> near the capital
Possible to do any planning in the region	0.14	2	0.07	S <sub>6</sub> public land
Allow visits for all age groups and even sick people	0.09	3	0.03	S <sub>7</sub> being paved area
Being low cost or no cost Visit	0.124	3.1	0.04	S <sub>8</sub> low cost regional tourism services and facilities
Different species of desert plants and animals there components and elements typical desert	0.231	3.3	0.07	S <sub>9</sub> diversity and multiplicity of natural attractions and cultural tourism can be developed
less than knowledge =less welcomes tourists	0.09	1.8	0.05	W <sub>1</sub> little familiar people with the cultural tourism area
did not help cause side effects remain is unknown	0.07425	1.35	0.055	W <sub>2</sub> lack specialize in tourism sector
Possibility of removing the vehicle is not feasible region	0.102	1.7	0.06	W <sub>3</sub> weak regional transport network
fewer amenities = less tourism	0.108	1.2	0.09	W <sub>4</sub> lack of residential units and services
Further degradation and ultimately less tourist	0.1105	1.7	0.065	W <sub>5</sub> lack of protection of tourist attractions and its degradation
The climate that enables visiting the area limits for five months of the year	0.21	3	0.07	W <sub>6</sub> climatic constraints
Creation of green space in the area is limited	0.01	1	0.01	W <sub>7</sub> lack of green spaces
Low advertising causes people not understanding and therefore lack of tourists is entering	0.0525	1.5	0.035	W <sub>8</sub> lack of advertising
Tourism e-commerce, science days	0.035	1	0.035	W <sub>9</sub> Lake people familiar e-Science
	2.27725		1	<b>Total</b>



The ultimate result of analyzing the internal factors (the set number of 2.27725) is the indicator that weaknesses of tourism within the national desert park is more than the strengths and massive strategies must be edited in a way that these weaknesses to be removed.

Table 2: the analyzing matrix of external factors ruling open the tourism within the national desert park (External factor analysis summary)(EFAS).

Description	Final score	Rated	Coefficient	External factors
more advertizing= More propaganda from the area of awareness = more tourists	0.165	3	0.055	<b>O<sub>1</sub></b> provide cultural products district
According to industry officials in recent	0.1125	2.5	0.045	<b>O<sub>2</sub></b> improvement Tourism Development
Investment in the region= Faster development of tourism industry	0.198	3.3	0.06	<b>O<sub>3</sub></b> There potential investors in tourism
Create jobs for local people	0.21	3	0.07	<b>O<sub>4</sub></b> employment
Cultural exchange between tourists and indigenous people	0.04	2	0.02	<b>O<sub>5</sub></b> cultural exchanges
Attract foreign tourists profitability and prosperity	0.08	2	0.04	<b>O<sub>6</sub></b> income for the country's currency by attracting foreign tourists
There are tourism professionals = attract more tourists	0.15	3	0.05	<b>O<sub>7</sub></b> utilization of educational centers around the city tourism
Participation↑ = cleaner environment = tourist↑	0.06	2	0.03	<b>O<sub>8</sub></b> for public participation in environmental
Relationship and alliance between different parts of the region to attract tourists	0.06	2	0.03	<b>O<sub>9</sub></b> created between towns and villages in the region
Radiant energy, huge tanks of salt, wind intensity and area. . .	0.21	3.5	0.06	<b>O<sub>10</sub></b> Industrial use of desert
due to Desert of Iran the authorities today of their development are welcome.	0.192	3.2	0.06	<b>O<sub>11</sub></b> positive attitude and state officials and managers improve their performance towards the development of desert regions
due to Applicant was not high tourism people are very active in this sector.	0.174	2.9	0.06	<b>O<sub>12</sub></b> low number of competitors active in the field of tourism
Some environmental laws to protect animals such as livestock grazing ... With some tourism development plans are incompatible	0.15	3	0.05	<b>T<sub>1</sub></b> lack of coordination between environmental regulations and Tourism
Most people regard the green areas and lack of attention to these areas people	0.04	2	0.02	<b>T<sub>2</sub></b> unwillingness of capital they invest in a desert
Low powers of local authorities and thus the incidence of some problems	0.06	2	0.03	<b>T<sub>3</sub></b> weak local authorities powers
Indigenous people enough knowledge of the benefits of tourism and there are tourists in their area and deal with it or do not participate	0.045	1.5	0.03	<b>T<sub>4</sub></b> non-participation of indigenous people and their resistance to the entry of tourists
Lack of political stability in attracting foreign tourists disruption makes	0.108	1.8	0.06	<b>T<sub>5</sub></b> unstable political situation in Iran at the international level
Propaganda abroad is negative towards Iran	0.12	2	0.06	<b>T<sub>6</sub></b> negative mental image of foreign tourists to Iran
Comprehensive definition of the industry still has not been provided	0.12	2	0.06	<b>T<sub>7</sub></b> lack of transparency and ambiguity in approaches to tourism development
Funding↑ = possibilities ↑ = attracting tourists↑	0.28	4	0.07	<b>T<sub>8</sub></b> lack of funding for tourism development
Different areas of tourism projects kavir no response plan in the Desert	0.04	1	0.04	<b>T<sub>9</sub></b> imitated executive and non-accountable plans in the region
	2.6145		1	<b>Total</b>

The ultimate extracts of analyzing surveys of external factors (the set total of 2.6145) is that the opportunities facing the area tourism is more than the threats around It, and as the result the massive strategies for tourism must be edited, in a way that utilize in the best possible way. Within the second stage (comparing stage) with the preparation of SWOT matrix the different kinds of strategies have become analyzed. The goal of this stage is not that, to particularize the best way of tourism in the area of national desert park, but to determine the applicable strategies. In order to determine the executive strategies from the internal and external matrix have been used. The resulting of drawing in formations from the analyzing matrix from the internal factors (2.27725) and analyzing matrix of external factors (2.6145) is the indicator of that the tourisms in the national park can be placed in option number 5 and is the most suitable strategy for the goal of preserving and maintenance of the existing situation (figure No.2).

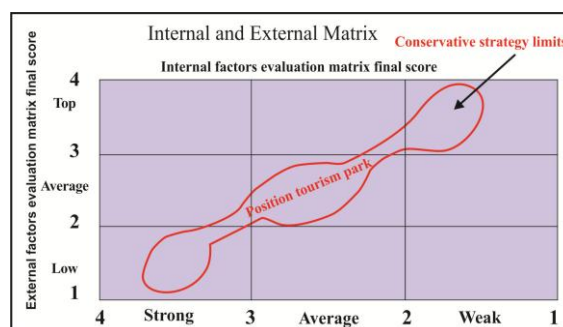


Figure 2: the chart of internal and external (IE) matrix in the tourism of national desert park

The selected strategies in the internal matrix and external are the same (WO) strategies which are more conservative within the matrix of threats, opportunities, strengths and weaknesses from the SWOT being edited, so that the external edited strategies, for the national desert park are as they follow:

1. Strengthening of the expertise personal by the advantage of tourist training centers around the cities in order to implore the expansion of (W2O2O7).
2. The instituting and improving of the accommodation units serving from the massive potential capitalizations (W4O3).
3. Enhancing the network of transportations from the area of helping by the government sector (W3O11).
4. Maintenance of the attractions from the people assistance and policing makers and responsible authorities (W5O11O8).
5. Underlying and offering extensive advertisings to assist the responsible authorities (W8O11).
6. Assimilating of the local people with the culture of tourism by the centers of tourists training within the surrounding cities by the payments of cost expenditures by the responsible authorities or the investors (W1O7O11).
7. Offering the cultural products of local people in order to encourage them into participations (O1W1).

The third stage is the decision makings, so the resulting strategies within the comparing stage have become analyzed and prioritized. According to the limitless of space the programming schedule of low strategy (Quantitative Strategic Planning Matrix) has not been entered and only the results will be presented.

Comparing the set points of attractions each of the strategies can be orderly given points from the highest attractions the lowest attractions. So that the massive strategies of the national desert park have been given priorities as it follows:

1. Maintenance of the attractions by the assistance of people and responsible persons (W5O11O8).
2. Instituting and improving the accommodation unties serving by the potentials from the investors (W4O3).
3. Offering the extensive advertisings in assisting the responsible persons (W8O11).
4. Enhancing the network of transportations of the area with the help of governmental sectors (W3O11).
5. strengthening the expertise personal by utilizing from the tourist educational centers around the cities in order to improve it is expansional operations (W2O2O7).
6. Assimilating the local people with the culture of tourism by the centers of tourist trainings around the cities by the payments for the by the responsible persons or investors (W1O7O11).
7. Offering the cultural products of the local people in order to encourage them into (O1W1).

## RESULTS

Analyzes have indicated that the existence of numerous potentials of the national desert park, that no suitable programming's of the ecotourism has been done. In this model after analyzing the internal and external factors from the effective matrix has been extracted. The ultimate results from the assessments of the internal factors (the set number of 2.27725) indicates that the weaknesses of tourism of the national desert park is more than its strengths and the massive strategies must be edited in a way that, these weaknesses to be removed. The number of points with the amount of 2.6145 more than the average of 2.5 as been reached, and so the ultimate extract

from the analyzing matrix of the external factors indicates, that the opportunities facing the tourism of the area is more than the threats around it, and as the result of the massive strategies for tourism of the area, it must be edited in a way that could utilize in the best way. Then the related information's of the threats, opportunities, strengths and weaknesses of the area to be compared together, and four kinds of edited strategies to be adopted:

Strength- Opportunities (SO)

Weakness- Opportunities (WO)

Strength- Threats (ST)

Weakness- Threats (WT)

The extracted matrix of internal factors and externals has indicated that the selective strategies in the internal matrix and external are the same WO strategies or conservative strategies which is in the matrix of threats, opportunities, strategies and weaknesses of the SWOT style that has edited, and in order to give priorities from the above mentioned factors from the Quantitative Strategic Planning Matrix (QSPM) has been used, and then after great deal of calculations and setting them, given priorities to the factors according to that it follows:

1. Conservation from the attractions by the assistance of people to the responsible authorities.
2. Instituting and improving the conditions of accommodation units serving by the potential investors.
3. Offering the extensive advertisements with the assistance of responsible persons.
4. Enhancing the network of transportation of the area by the assistance of the government sector.
5. Strengthening the expertise personal by utilizing from the tourist training centers around the cities in order to improve the operation and developments.
6. Assimilating the local people with the culture of tourism by the centers of training around the cities, by the payments of the responsible persons, or the investors.
7. Offering the cultural products of the local people in order to encourage them into cooperation.

Considering to what has been shown from the results of matrix surveys, and in order to stabilize the expansion of tourism and eco tourism of the area, it is necessary to consider the following points:

Strength- Opportunities (SO):

1. Utilizing the rules of current environmental and considerations particularly in accordance with the park to improve the performance of tourism.
2. Developing the resources and attractions of cultural and natural tourism, offering the cultural products and employments, with the assistance of responsible persons and utilizing the potential investors.
3. Utilizing from the factors and experienced personal for creating human formations, in accordance with the preservance of environment and in the extent of creating a better relation, between the cities and villages of the area and ultimately the exchange of cultural affairs with the tourists.
4. Utilizing the industry of desert lands by considering to the fact that lands are governmental and their close distances to the capital.
5. Following the massive strategies of expenditures (redoing the services of tourism considering to the low number of competitors.

Strength- Threats (ST)

1. Extracting the rules of environmental that helps to the growth of tourism and utilizing them.
2. Emphasis upon the Islamic countries in marketing the eternal tourists.
3. Developing different kinds of tourism in the area in order to clarify the phenomena of tourism.
4. Persuading the local people with conscious understandings
5. More emphasis upon the internal marketing of tourism
6. Making aware the investors to the attractions of tourism of the desert area the expenditures of low amount for instituting the facilities considering the facts that the lands are governmental.

Weakness- Threats (WT)

1. Considering the set of limitations from internal area and the threats of external causes must, until removing all these effects and the execution of suitable planning with adequate budgets, and encouraging the investors in the desert areas, the foreign countries must be deleted from the marketing and concentration must be placed upon the internal tourism so that tourism can become for less than one day duration time.

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## ASSESSMENT TOURISM ABILITIES OF PROTECTED REGION PARVAR IN SEMNAN

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### ABSTRACT

Profit from nature, now called ecotourism, is an important part of tourism activities. Various weather, existing nature gifts in Mahdishahr, as well as historical heritage, cultural, art, cultural, architecture, handicraft works and also different and beautiful attractions, such as the Parvar protected region may be important. This region includes different beautiful valleys, splendid slope and heights, flora and fauna special to this region. All these provide the ability for enjoying and programming of interesting products, particularly in tourism and ecotourism. The Parvar protected region and Mahdishahr city play a special role in tourism using with various abilities in different fields. The study results can be considered as a model pattern for applying environmental abilities and systematic outlook in developmental programming and recognition of the necessary capabilities for different parts of tourism and ecotourism. This may lead to compiling regulations and laws for the kinds of permissible and conditional application in the region.

**Key Words** : Ecotourism, stable development, tourism.

# AN EMPIRICAL INVESTIGATION OF TOURISM AND ECONOMIC DEVELOPMENT IN BANGLADESH: SOME POLICY ANALYSIS

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## ABSTRACT

Tourism industry with its concrete and quantified growing trading opportunities has been considered as an effective channel of creating employment, reducing poverty, attracting foreign investment and earning foreign exchange in both developed and developing countries. This study investigates the causal relationship between tourism expansion and economic growth in Bangladesh over the period 1974 to 2006. Using cointegration method and granger causality test, I have found a long run equilibrium relationship and further bidirectional causality between tourism development and economic growth. The result suggests that since tourism and economic growth are complementing each other, government should trigger policies accordingly.

**Key Words:** Tourism Development, Economic Growth, Granger Causality, Bangladesh

## INTRODUCTION

The relationship between tourism development and economic growth of a country is one of the most important topics of economic research. Tourism sector can play an important role as a driving force of economic development both globally and on the national scale, and the continuing growth of tourism and tourism-related activities has diverse implications for the attainment of sustainable development. The most significant economic feature of tourism industry is that it contributes to three high priority goals of the developing countries: the generation of income, employment and foreign exchange earnings. Foreign exchange earnings from tourism can also be used to import capital goods to produce goods and services, which in turn lead to economic growth (McKinnon, 1964). Tourism also contributes to the alleviation of poverty in developing countries by creating jobs for the marginal and disadvantaged groups, providing adequate training in management skills and technology to the local people and by increasing incomes in rural and local economies.

As this industry is labour intensive and offers a wide range of job opportunities both for the unskilled and skilled workers, tourism expansion represents a good prospect for economic growth, especially in the third world countries like Bangladesh where cheap but unskilled workers are readily available. Bangladesh offers the rare beauty of enjoying sunrise and sunset in fascinating Kuakata, the rare beauty of the Sundarbans having the biggest mangrove forest area in the world and the abode of Royal Bengal Tigers, world's largest sandy sea beach in Cox's Bazar, many old archaeological sites across the country and many more attractions. Tourism development may be an important instrument for economic advancement for Bangladesh if necessary initiatives are taken. Besides, a large number of universities sprung up recently in Bangladesh with the facility to produce skilled manpower that can readily be used to serve the tourism industry.

Although there is a common perception among the economists that tourism has contributed positively to economic growth, to the best of my knowledge no study has been conducted to investigate the causal relationship between tourism development and economic growth in Bangladesh. Broadly speaking, existing literature observes four possible relationships between tourism and economic growth: tourism led growth; economic driven tourism growth; neutrality; and feedback hypotheses. If causality runs from tourism to economic growth and the relationship is positive—Tourism Led Growth Hypothesis (TLGH) suggests that an economy is tourism dependent and hence tourism leads to growth. On the other hand if causality runs from economic growth to tourism and the relationship is positive, this implies that an economy is not tourism-dependent and supports the economic driven tourism growth. The feedback hypothesis suggests that tourism development and economic growth are interrelated and complementing each other. Finally, if there is no causality in either direction, the neutrality hypothesis implies that changes in tourism expenditure are not associated with changes in GDP. This article tries to identify the causal relationship between tourism and economic growth by using modern econometric techniques and recommend some policy ideas based on the empirical results.

Rest of the paper is organized as follows. Next section presents the review of literature. The following section provides a brief description of tourism industry in Bangladesh. The section after that discusses methodology and attributes of data. Econometric results and their discussion follow in the subsequent section with concluding remarks.

## LITERATURE REVIEW

Relationship between tourism and the economy has been addressed in several studies. These studies have their own approach and scope. The theoretical background focuses on the Keynesian concepts of economic growth and the multiplier concepts to analyzing the role of tourism in economic growth because tourism activity is heavily based on the consumption of the tourists on several tourism related products. It also accelerates the pace of the infrastructural development and other socio economic development which is considered as part of investment that increases the GDP. In addition, tourism is usually considered as non-traditional export for a country. Tourism multipliers measure the present economic performance of the tourism industry in a particular country. The multiplier concept is based upon the recognition that the various industrial sectors of the tourism destination economy are interdependent. The 'first round' of tourism recipients comprises the spending by the foreign tourists on hotels, foods and other direct tourism business (Direct Effect). It also leads to some additional purchases from other sectors in the economy which is referred to as the indirect effect of income. The wages of the tourism industry make them to purchase more goods and services which generate induced effect of income.

The labour-leisure relationship postulates a positive relation between leisure and productivity. The most effective and productive means of use of leisure would be to do tourism which enhances productivity through different channels. Solow and other neoclassical economist argued that technological improvement or productivity is one of the key determinants of economic growth. In this regard Tourism could enhance the productivity of labour which in turn accelerates the economic growth of any country. Parkin (1988) and Hall (1997) conducted two interesting macroeconomic studies and discussed that consumption-leisure ratio could be interpreted as one of the determinant of the marginal product of labour.

On empirical side, the analyses on tourism development and economic growth relationship depends on the methodology used, the country and time period span used. As expected, the empirical results have yielded mixed results in terms of the aforementioned hypotheses on the causal relationship. The variation in results may be attributed to variable selection, model specifications, time periods of the studies, and econometric approaches undertaken.

Kim, Chen and Jang (2005) examined the cointegration and causal relationship between tourism development and economic growth by using Taiwanese data from January 1971 to July 2003. By using Engel Granger and Johansen cointegration procedure they found a long run equilibrium relationship and a bi-directional causality between the two variables indicating that in Taiwan, tourism and economic development reinforce each other. Chi-Ok Oh (2003) examined the question of causality between tourism and economic growth for Korean economy over the period of the first quarter of 1975 through to the first quarter of 2001 using Engel Granger two stage approaches and a bi-variate Vector Auto regression (VAR) model. His results revealed that there was no long run cointegrating relationship between the two series.

Kreishan (2010) examined the causal relations between tourism earnings and economic growth (GDP) for Jordan, using annual data covering the period 1970-2009. The Granger causality test results revealed the presence of unidirectional causality from tourism earnings to economic growth. Mishra, Rout and Mohapatra (2011) revealed a unidirectional causality from tourism activities to economic growth in India for the period spanning from 1978 to 2009.

Balaguer and Cantavella-Jorda (2002) investigated the causal relationship between tourism development and economic growth using data from 1975 to 1990 in Spain and found that tourism affected Spain's economic growth in one direction which was supporting the Tourism Led Growth Hypothesis (TLGH). Dritsakis (2004) examined the impact of tourism on the long run economic growth of Greece by applying a multivariate autoregressive VAR model from 1960 to 2000. Granger causality tests based on Error Correction Models (ECM) supported both tourism-led economic development and economic driven tourism growth in Greece.

Brida et al (2008) investigated the possible causal relationship among tourism expenditure, real exchange rate and economic growth in Mexico by using quarterly data from 1980 to second term of 2007. By applying Johansen and Granger causality they revealed that tourism was an important determinant of the overall long run economic growth in Mexico supporting the TLGH. Croes and Vanegas (2008) investigated the relationship among tourism development, economic expansion and poverty reduction in Nicaragua using annual data from 1980 to 2004. The results revealed a long run stable relationship among the three variables and suggested a one way causal relation between tourism development and economic expansion. Wickremasinghe and Ihalangayake (2006) examined the causal nexus between GDP and international tourism receipts in Srilanka from 1960 to 2000. They used multivariate cointegration, error-correction modelling and found a significant causal relationship from tourism receipts to the GDP of Srilanka.

## AN OVERVIEW OF TOURISM IN BANGLADESH

Bangladesh is blessed with fascinating beauties of nature, which has provoked many travellers from abroad to undertake a journey to this land of the Bengali's. Bangladesh possesses the rare beauty spot of sunrise and sunset in Kuakata and the Sundarbans-the abode of the royal Bengal tiger, the world's longest unbroken sandy sea beach in Cox's Bazar(120 km long ), the oldest archaeological site in Mahasthangar and Paharpur, the world's largest terracotta temple-Kantajir temple in Dinajpur and many other historical heritage. Sundarbans also offers the world's largest mangrove forest area. The Kaptai lake and hill tracts in Rangamati, Madhabkunda falls in Sylhet and Dulahazra Safari park in Chittagong also attracts lot of ecotourists to enjoy the scenic beauties.

Bangladesh Parjatan Corporation (BPC), the national tourism organization of the country, was established in 1973 with the intention of developing the tourist facilities and promoting tourism products and creating a favorable image of the country. Despite lot of potentials, BPC fails to reap the benefit fully because of lack of proper investment, government and private involvement, proper planning, poor security and safety condition, bureaucratic problems, lack of attractive hotels, limited marketing strategy and promotional activities, substandard in tourism infrastructure, complicated border formalities (including visa and permits) and perceived difficulties of travel, disappointing customer services, high taxation on tourism related goods, shortage of skilled personnel throughout the tourism sector and poor country image.

Having realized the importance of this industry, BPC is reforming this sector by opening up the tourism sector to private investors and easing bureaucratic grips to develop the industry. They are now taking some extra care for the development of infrastructure, establishing regional training institutions in the tourism rich districts to produce skilled manpower and offering short-time training courses at several districts under the national hotel and tourism institute. They are also planning to develop the ecotourism marketing strategy and to attract one million eco-tourists a year because now a day the number of eco-tourists in the world has been increasing by more than ten percent a year. In its endeavour to develop the sector, Government has very recently decided to transform Bangladesh Parjatan Corporation into Bangladesh Tourism Development Board.

## METHODOLOGY, VARIABLES AND DATA SET

I tested the existence of unit root to check the stationarity of the variables. Macro variables are well known for their non stationarity. I performed Augmented Dickey Fuller (ADF) test to find the existence of unit root. I found that one of the variables are non stationary and thus cannot be regressed without making it stationary. Then I ran cointegration test to find out possible linear combination of the variables that can be considered stationary. If I found that the variables are cointegrated, then I ran Granger casualty test to check the possible direction of causality.

In time series analysis, non stationary data may lead to spurious regression unless there exists at least one cointegrating relationship. The Johansen procedure is applied to test for cointegration. This method provides a unified framework for estimation and testing of cointegration relations in the context of Vector Autoregressive (VAR) error correction models. For this approach one has to estimate an unrestricted vector of autocorrelation of the form:

$$\Delta x_t = \alpha + \theta_1 \Delta x_{t-1} + \theta_2 \Delta x_{t-2} + \theta_3 \Delta x_{t-3} + \dots + \theta_{k-1} \Delta x_{t-k+1} + \theta_k \Delta x_{t-k} + u_t$$

Where  $\Delta$  is the difference operator,  $x_t$  is a  $(n \times 1)$  vector of non-stationary variables (in levels) and  $u_t$  is also the  $(n \times 1)$  vector of random errors. The matrix  $\theta_k$  contains the information on long run relationship between variables. If the rank of  $\theta_k = 0$ , the variables are not cointegrated. On the other hand if rank (usually denoted by  $r$ ) is equal to one, there exists one cointegrating vector and finally if  $1 < r < n$ , there are multiple cointegrating vectors. Johansen and Juselius (1990) have derived two tests for cointegration, namely the trace test and the maximum eigen value test. The trace statistic evaluates the null hypothesis that there are at most  $r$  cointegrating vectors whereas the maximal eigen value test, evaluates the null hypothesis that there are exactly  $r$  cointegrating vectors in  $x_t$ .

According to cointegration analysis, when two variables are cointegrated then there is at least one direction of causality. Granger-causality, introduced by Granger (1969, 1980, 1988), is one of the important issue that has been much studied in empirical macroeconomics and empirical finance. Engle and Granger (1987) have indicated that the existence of non-stationary, can give misleading conclusions in the Granger causality test. It is



only possible to infer a causal long run relationship between non stationary time series when the variables are cointegrated.

If  $y$  and  $x$  are the variables of interest, then the Granger causality test determines whether past values of  $y$  add to the explanation of current values of  $x$  as provided by information in past values of  $x$  itself. If past changes in  $y$  does not help explain current changes in  $x$ , then  $y$  does not Granger cause  $x$ . Similarly, we can investigate whether  $x$  Granger causes  $y$  by interchanging them and repeating the process. There are four likely outcomes in the Granger causality test: (1) neither variable Granger cause each other, (2)  $y$  causes  $x$  but not otherwise, (3)  $x$  causes  $y$  but not otherwise, (4) both  $x$  and  $y$  Granger cause each other.

In this study the causality test between GDP and Energy indicators will be conducted. For this the following two sets of equation will be estimated:

$$x_t = \alpha_0 + \alpha_1 x_{t-1} + \dots + \alpha_l x_{t-l} + \beta_1 y_{t-1} + \dots + \beta_l y_{t-l} + u_t$$

$$y_t = \alpha_0 + \alpha_1 y_{t-1} + \dots + \alpha_l y_{t-l} + \beta_1 x_{t-1} + \dots + \beta_l x_{t-l} + v_t$$

For all possible pairs of  $(x, y)$  series in the group. The reported F-statistics are the Wald statistics for the joint hypothesis  $\beta_1 = \beta_2 = \beta_3 = \dots = \beta_l = 0$

As explained in the introduction this paper examines the direction of causality between tourism and national output of Bangladesh. The measure of Real GDP (RGDP) can be considered as an indicator of economic development. Tourist Receipts (TR) has been considered as a proxy of Tourism Development.

The Data for all the variables have been drawn from different issues of Economic Trends published by Bangladesh Bank. My data set spans over the period 1974-2006 for which 33 observations are available at most. Since the relationship is dynamic one, so inclusion of very old data can produce us wrong outcomes. Small sample size might be problematic in finding the long run relationship. Eviews 5.0 and Microfit 4.1 have been used as statistical software packages for all the tests run in this study. All the econometrics results are available on request.

## RESULTS

Unit root tests were conducted to determine the order of integration of the data series for each of the variables. Here it is worth mentioned that unit root tests have non-standard and non-normal asymptotic distribution which are highly affected by the inclusion of deterministic terms, e.g., constant, time trend etc. A time trend is considered as an extraneous regressor whose inclusion reduces the power of the test. However if the true data generating process were trend stationary, failing to include a time trend also results in a reduction in power of the test. In addition, this loss of power from excluding a time trend when it should be present is more severe than the reduction in power associated with including a time trend when it is extraneous (Lopez et al, 2005). So, in this study I have also considered time trend for more robust result.

From Table 1, it is clear that RGDP is stationary in the level whereas TR is stationary in the first differenced forms. The above results also imply that the variables would yield spurious results unless the variables are cointegrated. These results, however, allow to proceed the next stage of testing for cointegration.

Results of Johansen test for cointegration is given in the table 2 and 3. The Granger causality test has been done and the results are reported in table 4. The result shows that there is bidirectional causal relationship running between RGDP and TR.

## CONCLUSION AND POLICY RECOMMENDATIONS

This paper has attempted to analyze empirically the causal relationships between tourism and economic growth in Bangladesh and I have found that economic growth and tourism reinforces each other which is found in studies done on many other countries as well. An empirical analysis like this study is very important for any country that may want to develop the tourism industry as part of its national economic development policy. The results can guide the policy makers of the country to implement most appropriate policy for the well being of the country. The results of the study reveal that by ensuring higher economic growth, Bangladesh could accelerate the growth of tourism industry. On the other hand, if Bangladesh should pay more attention to this industry, tourism could make a larger contribution to GDP in the country.

There is little doubt that tourism in Bangladesh will have a promising future. The rich resource base for attracting tourists in Bangladesh has been well recognized. So, efforts are needed to initiate for better policy, programs and strategies for further diversification of tourism to new areas, addressing dynamic promotional activities, participation of rural communities, private sector's involvement in tourism development, rapid development of infrastructural facilities, exploitation of the linkages between tourism and other sectors of the economy and backward and forward linkages for sustainable development.

In addition, having so many world class ecotourism attractions, ecotourism and ethnic based tourism should be given the highest priority in the tourism policy and programs. Bangladesh should upgrade the hospitality sector by training trainers in tourism marketing, planning and management and improve the law and order condition around the tourist spots. Furthermore, taxes on tourism related goods, alcohols should be lowered. By means of regional trade, South Asian Association for Regional Cooperation (SAARC) member states should promote each other in developing different types of tourism, establishing unified inter-country communication and transportation adopting simplified visa formalities etc.

The results obtained from the study focuses on several research options for the future. Researchers could either estimate separate time series regressions for multiple countries or a panel data model- depending on the number of countries and the time period available. This study may be expanded by including some other important variables such as exchange rate and international trade to get more precise results. Future researchers may also wish to focus on tourism expansion and regional development within Bangladesh.

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## APPENDIX

Panel 1: Levels			
	ADF Statistics (Only Constant)	ADF Statistics (Constant & Trend)	Decision
RGDP	11.188838	5.526049	Stationary
TR	2.816697	0.482262	Non Stationary
Panel 2: First Differences			
	ADF Statistics (Only Constant)	ADF Statistics (Constant & Trend)	Decision
RGDP	Not Applicable as RGDP is I (0)		-
TR	-3.917368	-5.059169	Stationary

Note: Selection of the lag is based on Schwartz Information Criterion (SIC). Eviews 5.0 software automatically selects the most significant lag length based on this criterion.

	Null Hypothesis	Alternative Hypothesis	Statistics	95% Critical Value	Conclusion
RGDP and TR	None	At Most One	33.26 (0.00)	15.49 (3.84)	One Cointegrating Relationship

	Null Hypothesis	Alternative Hypothesis	Statistics	95% Critical Value	Conclusion
RGDP and TR	None	At Most One	30.85 (0.00)	14.26 (3.84)	One Cointegrating Relationship

Hypothesis	F-Statistics	P-Value	Granger Causality
RGDP does not Granger Cause TR	4.31498	0.04674	Bidirectional Causality RGDP↔TR
TR does not Granger Cause RGDP	3.17444	0.08527	

# INDUSTRIAL HERITAGE TOURISM IN SLOVENIA: OPPORTUNITIES FOR SUSTAINABLE TOURISM

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## ABSTRACT

After the 'fall of socialism', a sector of industry became genuine, if recent, history, leading to the inclusion of industrial heritage sites in tourism packages. Here some urban plants in three Slovene cities are selected and analysed in order to design various museums and other participation-oriented plans which, with stakeholder involvement, should improve the nation's standing as regards sustainable forms of industrial tourism.

**Key words:** Economic transition, industrial heritage, industrial tourism, sustainable tourism, new tourist products, interpretation

## INTRODUCTION

The 'Fall of socialism' was followed by a period of transition. Society and the economy were forced to restructure and adapt to a market economy. Such radical change is reflected in space. This transition was characterized by the complex politics, which is evident from the way cities have been transformed, where space has been re-valued and places re-created with new identities and images (Rátz et al, 2008). Many companies have succumbed to the restructuring and failed, others considerably reduced the volume of their work and production. One important point in this regard is that a sharp historical fissure is clearly evident. Slovenia has already established many examples of good practice in presenting industrial and technical heritage, such as the National Technical Museum in Ljubljana, the City Museum in Idrija, the coal mine museum in Velenje, the museum Kanižarica in Bela Krajina, the museum of iron heritage in the Gornjesavska region in Jesenice and the Koroški Provincial Museum as well as the presentation of Maribor industry at the Museum of National Liberation Maribor. Yet many industrial plants remain abandoned and unused, their previous strong and well-established industrial roles reduced after restructuring. Since industrial heritage represents a rather new and unusual opportunity for tourism, some examples of this heritage in three Slovene cities are presented and analyzed, concluding that with the appropriate vision industrial tourism can be run according to the principles of sustainable tourism.

The central part of the text presents various proposals for their integration based on appearance, functions, positions in space and typological diversity. Certain industrial plants are proposed as separate tourist products, while others are set out as complementary to existing tourist facilities. On this basis, their integration is suggested in a variety of ways: the establishment of museums, expansion of the existing museum collections, the establishment of an open-air museum, creation of info-points, some souvenir shops, and the creation of learning pathways. In conclusion, the importance and promotion of the integration of industrial heritage in tourism is highlighted. In addition, the importance of the involvement and participation of all potential actors in the realization of new tourist products of sustainable tourism on the local, regional, and national levels is emphasised.

## INDUSTRIAL TOURISM AND SUSTAINABILITY

Industrialization represents such an important turning point of human history it has lent its name to an era. Over the past hundred and fifty years, due to changes in production practice civilization thoroughly changed. The identity of industrialization, its developmental characteristics and particular impact on human daily life are themes that are becoming increasingly attractive to a diverse and large crowd not only of researchers but also among the general public. Considering this, at a time of stark change within the industrial era, tourism can play an important role in knowledge transfer, through the interpretation of industrial heritage, traditions and culture in general. Since the number of cultural tourists are increasing it is reasonable to increase the supply with new products. In this regard there is great potential in the development of tourism based on industrial heritage. Industrial heritage is a part of the 'cultural tourism' the defined by the UN World Tourism Organization as travelling with the aim of learning about foreign cultures, presentation of one's own art work, the visiting of festivals, cultural sightseeing, etc., and in the broad sense as tourism that satisfies tourists' needs to learn about foreign countries and raises their cultural level, knowledge and experiences through meeting other people (Richards, 1997). Cultural attractions have become particularly important in tourism. Cultural attractions like

museums and monuments constitute the largest sector on the European attraction market and even more, they represent the centre of urban and rural development strategies (Richards, 2001).

Industrial tourism is still a relatively raw area. In the U.S., the concept of industrial tourism is used in cases where there is a commercial approach to tourism in order to maximize the return of investment. From this perspective it is understood as a commercial sales approach to fulfill bed capacities in the context of mass tourism. In Europe, this term is related to visits to industrial areas, representing industrial heritage. In France, Spain and Germany, the tourism industry term is used for visiting industrial heritage sites as well as factories in operation, while the Anglo-Saxon world separates the visits to factories in operation which is defined as industrial tourism and factories out of operation which is defined as industrial heritage tourism (Ifko, 2010). In this case, this division will not be used so strictly and some examples of both cases will be presented.

It may be helpful to provide an example, as the word 'industrial' is certainly without romance. Yet this is an old form of tourism with innumerable examples of success. An interesting example is the Carta Mundi playing card factory in Turnhout, Belgium. There one can review the history of playing cards, see how they are made, and, of course, purchase reproductions of old cards. The plant is still operating, but as cards have changed over the years, there is an interest in different production techniques, designs, and materials. Breweries are further examples. Throughout the brewing world, visitors are invited to view the brewing process and sample the results. In Slovenia, though they are not discussed in this particular paper, two major breweries exist that cater to tourists while producing substantial amounts of their main product. Also important are corporate wineries that are now shifting their business into wine tourism in the regions where there is already well developed tourist economy and where rural tourism in a combination and synergy with other tourist activities can provide supplementary and new tourist products (Bojnec & Jurinčič, 2006).

Research demonstrates a growing demand for tourist visits to environmentally responsible destinations. This indicates the increasing use of the internet for the purpose of finding information about destinations and purchasing travel services and environmental awareness of the population in EU member states, especially in central and northern Europe. It should be noted that economic, political and demographic changes have a significant impact on the tourism market (recession or inflation, war or terrorism, epidemic diseases, human intolerance and racism). These changes adversely affect the number of trips and the average period of stay, consumption of tourists at each destination and the reputation of tourist destinations (UNWTO, 2010). As the destinations in the 'Third World' are considered less desirable, closer destinations to western and central Europe, more easily accessible, not requiring air transport but still within reach of public transport, are gaining more importance. On this basis the principles of sustainable tourism development should be considered. These are:

- sound financial and business planning environmental management
- sensitivity to cultural and social dynamics
- efficient management, training and customer service
- consideration and inclusion of all stakeholders
- long term vision and good cooperative governance
- marketing and communications programs to showcase positive elements (UNWTO, 2010)

## **INDUSTRIAL HERITAGE SITES AND THE DEVELOPMENT OF NEW TOURISM PRODUCTS**

Slovenia has some prominent industrial facilities that typologically fit into the category of building heritage and have prominent social and technical significance. In the capital, Ljubljana, several factories operated before and during the socialist years. Among the most prominent still standing are Litostroj and Droga Kolinska. The former is now a specialized producer of complex shaped individual castings made of steel and special alloys focused on supplies of components for hydro, gas and steam turbines, pumps, valves and shipbuilding serving the global market. Founded in 1947, Litostroj developed from a classic iron foundry to a high-tech cast steel plant. As mechanical plants had existed for more than one hundred years in the Ljubljana region, Litostroj was born amidst an established industry. The first iron was made and poured on September 1, 1947, in a new plant, ceremoniously opened by Josip Broz Tito, then president of Yugoslavia, and named Titovi zavodi Litostroj until 1990 (Litostroj jeklo, 2010). Kolinska (today part of the Droga Kolinska Group) produced a selected assortment

of foods for the market, such as coffee, natural mineral and spring water, soft drinks, spreads, sweet and salted snacks and children's food. Kolinska was one of the oldest factories in Ljubljana, founded in 1908 as a branch factory of the Czech town Kolin (Bogataj, 1992). The factory, which first produced only chicory, greatly expanded in 1946, producing more and more new products and employing more and more workers. It produced puddings, soda, vanilla sugar, baking powder, spices and condiments, sugar products and ice cream.

Figure 1



Author: Gregor Balažič

Figure 2

Industrial heritage sites in Ljubljana: Litostroj Jeklo (top), Droga Kolinska (bottom).



Source: Photos by Gregor Balažič

Several metal and textile manufacturing factories were operating in Maribor, the most industrial city during the socialist era in former Yugoslavia. The two most prominent of that time were TAM (today named TVM), a factory producing vehicles, and TVT Boris Kidrič (today named WVterm), producer of rail vehicles and heating devices. TAM's history stretches back into the era following World War II with the establishment of the company Tovarna avtomobilov Maribor, which was at that time the largest manufacturer of trucks and buses in Yugoslavia (TVM, 2010). Factory TVT Boris Kidrič (the factory was named in the seventies after the Slovene hero Boris Kidrič) dates back to the year 1863, when it was located in Studenci, near Maribor, and functioned as a workshop for refurbishing rolling stock after the establishment of the Vienna-Trieste railway. Eventually the premises were converted almost entirely to use for the reconstruction of steam locomotives, but eventually, of course, the demand dissipated and the company established an association with the German firm Stadler and began the manufacture of boilers for central heating (WVterm, 2010).

Figure 3

Industrial heritage sites in Maribor: TAM (top), TVT Boris Kidrič (bottom).



Source: Photos by Gregor Balazič.

As a port city, Koper's development during the socialist era, while guided by industrial needs, was of course transport oriented. In 1947, before World War II Kemiplas was founded. This factory with its chemicals production benefited from its favorable geographic position near Koper, very close to the Italian border, and began the manufacture of plastic products. It produced different kinds of items made of plastic, like audio cassettes, bags, trays and plastic containers for domestic use as well as for military needs (Kemiplas, 2010). Today, the plant does not operate, as it is in the process of obtaining environmental permits. Shortly after the establishment of the port company Luka Koper in 1957 (Luka means port in Slovene) authorities established a factory of motorcycles named Tomos in Koper. The factory of motorcycles was officially opened in 1959, again, in person, by president Tito. Today it extends to a 23,000m<sup>2</sup> area of production (Tomos, 2010). Tomos for many years was the main two-wheeler of Yugoslavia. Today, in all of ex-Yugoslavia, not only are old Tomos vehicles recalled fondly, there are numerous collectors.

Figure 4

Industrial heritage sites in Koper: Kemiplas (top), Tomos (bottom).



Source: Photos by Gregor Balazič

All factories from the three cities share an industrial heritage. Such prominent industrial facilities fit into the category of building heritage (Zavod za varstvo kulturne dediščine Slovenije, 2010) and with prominent social and technical significance of their time and region are by nature part of the worldwide phenomenon of industrial tourism. Industrial heritage tourism is concerned with presenting machinery, processes, buildings, manufacturing processes, and ways of life. A factory may decide to open a museum on the industry's history while inviting visitors to tour the existing factory as well. There are several possibilities for organizing a tourism product: a factory tour, a purpose-built visitor center, catering facilities and shops selling the company's products (Yale, 2004).

Litostroj, Droga Kolinska, TAM, TVT Boris Kidrič, Kemiplas and Tomos each has its own unique untapped tourism potential in the form of industrial and technical heritage that may constitute a separate or additional tourist offer. The listed industrial plants were restructured, but their rich industrial legacy remains untapped. Up to now there were many changes in production techniques and variety of products. Major changes have also occurred in the social context of work organization and employee roles.

The separate part of the tourist offer would be represented by technical museums and perhaps souvenir shops in the former factories that could be in one of the existing derelict sheds (refurbished), and representing a collection of its variety of different products, past and present. In fact, a collector's market actually exists for old and unusual cars formerly ubiquitous in Yugoslavia to go along with the Tomos bikes. There is also a possibility of guided tours in factory areas. Regarding this, it would be necessary to create a thematic (learning) pathway on which visitors would see different aspects of production techniques during the era of operation of the plants. This could also be arranged for school groups. Because of the plants' large areas, visits would be possible also with bicycles. Among the plant sites in the same city a cycle route linking industrial heritage sites could be established. In Maribor, for example, from the factory TAM (TVM) to the factory TVT Boris Kidrič (WVterm), or in Ljubljana from Litostroj (Litostroj jeklo) to Droga Kolinska. The established route would include the local providers of authentic cuisine. In the case of an additional tourist offer all mentioned industrial sites could represent an important part of a city's museums and be at their disposal for visits at specified times and occasions, even with some open-air exhibitions.

Factories have influenced the development and expansion of the suburban settlements around their areas, which in many cases are barely distinguishable from one another. Thus suburban areas may represent an important part of industrial plants as settlements of factories workers during socialist times along with an architecture of function and expediency. Employees from the factories lived in these settlements in large blocks of flats and terraced houses. Suburban settlements could be a part of the proposed technical museums on the theme of everyday life during socialism. It would also be appropriate to regulate thematic pathways or even open-air museums. Visitors on a guided tour would see a certain part of these suburban settlements (as architectural and urban heritage) and take note of the daily lives in these settlements where there could be some service facilities arranged in the socialist era style (socialistic store, socialist-style mail office). In this case, it would be necessary to establish a proper interpretation. This could be based on information boards, which could, if necessary, also be accompanied by guides. In both cases this would cater to different target groups of visitors.

## CONCLUSION

The changes brought about by the period of industrialization and socialism in Slovenia constitute an industrial heritage. Today, amid a democratic and capitalist society industrial heritage forms a spatial and historical reflection of the industrial period intertwined with the post-modern trends and established principles of sustainability in space policies. In addition, industrial heritage sites represent yet untapped tourism potential to be integrated in the tourism offer as separate or complementary tourism products.

In the text, some of the potential industrial plants from three Slovene cities were registered and analyzed. Proposals for the integration of industrial heritage are only one small step forward and that in this regard, much remains to be done. The vision for tourism development should be focused on the further development of tourist attractions to offer new tourism products. This requires good cooperation, dialogue and communication and interdisciplinary work. Success eventually will depend on the involvement of all professional bodies and interested members of the public to be involved in the necessary studies that will determine which examples of industrial heritage are worthy of integration into the tourism offer.

Tourism as a market economic branch requires perpetual development and adjustments to market trends. The recognition of industrial heritage and its integration in a sustainable way into the tourism offer appears to be one opportunity to fulfill these needs. At the same time industrial heritage represents an opportunity to develop sustainable forms of tourism, as is the general feature of heritage tourism. Thus, the integration would not only mean a major environmental and economic contribution, but also enhance the regional and national recognition and identity of these regions (Balažič, 2010). Concomitantly, it would increase the number of tourists visiting Slovenia and its cities and contribute to the better promotion of the country.



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# INVESTIGATION OF EFFECT OF CLIMATE CHANGING AND ITS EFFECTS ON TOURISM

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## ABSTRACT

In the age of the machine, Tourism is considered as one of the human priorities and needs. It has developed increasingly in recent years, so that now for every nine workers and employees around the world, one person is working in the tourism industry. Revenues from this industry are so high that the economists know it as the third dynamic and growing economic phenomenon after the oil and automotive industries. Tourism can be carried out within the natural and social environment. Particularly natural elements are considered as primary and raw materials in tourism.

Any change in the quality of these resources, resulting from political conflicts, environmental pollution, economic instability and climate change strongly affects and damages tourism. Earth weather during the twentieth century, especially in the past two decades has lost its balance and shows a tendency to increase the temperature. These changes can lead to more rainfall and water cycle, faster water evaporation, and change the paths of waters on the earth.. They can exacerbate hydrological anomalies such as droughts and floods.

Tourism is not exempt from these changes, and climate change will affect it. This study will examine the climate change issue, using descriptive, documentarian and statistical methods. This study shows that climate change, due to the affecting on parameters such as temperature and precipitation, has reduced quality of tourism facilities and as the consequence, has caused reduction in tourism revenues, increased unemployment, and social crises. Finally, we provide solutions, which can be effective in reducing the vulnerability of the tourist areas associated with climate change.

**Key Words:** tourism, climate change, natural environment, tourism areas

# PERCEPTIONS OF TOURISM IMPACTS: A LONGITUDINAL STUDY USING DATA FROM SUNSHINE COAST RESIDENTS

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## ABSTRACT

This study investigates whether there has been a change in residents' perceptions of living on, and tourism impacts, on the Sunshine Coast in 2009 from their perceptions of 2008. In collecting the data for this study, a survey approach was taken. The survey attracted 1572 and 587 resident participants in 2008 and 2009 respectively. Over 55% of the respondents reported that lifestyle and general pace of life were the key attractions of living on the Sunshine Coast in 2009 as opposed to 32% in 2008. The results also demonstrate a significant increase in residents' perceptions that tourism is likely to have a positive impact on the cultural identity of the community and provide more parks and other recreational areas for local residents. The study also found that between 2008 and 2009 there was a significant decrease in the residents' concerns regarding traffic congestion; noise and pollution; crime rates; destruction of the natural environment; and unpleasantly overcrowded beaches, and bush walking paths, parks and outdoor facilities in the community. The study, however, reveals no significant differences in the residents' perceptions of conservation of natural resources; creation of employment; and the possibility of having more cultural exchange between tourists and residents due to tourism. Overall, these findings are favourable for tourism-related stakeholders in developing future tourism plans for the region in that residents' appear to be more willing to support tourism development. They also indicate the importance of not relying on a single measure in time when making policy and planning decisions.

**Key words:** residents' perceptions, tourism, sunshine coast, surveys

## INTRODUCTION

The tourism literature reveals that residents' attitudes toward tourism play an important role for sustainable management of tourist destinations (Sharma & Dyer 2009a; Sharma et al. 2008; Inbakaran & Jackson 2006; Gursoy & Rutherford 2004; Andriotis 2004; Gursoy *et al.* 2002; Teye *et al.* 2002). Therefore, much attention from tourism related scholars and researchers has resulted in a large number of articles in scholarly journals which have examined various aspects of tourism including its impacts on host communities and residents' attitudes toward tourism (eg. Brida et al. 2010; Vargas-Sanchez et al. 2009; Sharma & Dyer 2009b; Wang & Pfister 2008; Solberg & Preuss 2007; Inbakaran & Jackson 2006; Teye et al. 2002; Jones et al. 2000; Fredline & Faulkner 2000; Carmichael et al. 1996; Caneday & Zeiger 1991).

Involvement of residents in community decision making about tourism becomes helpful in influencing and shaping the way they perceive the impacts of tourism (Bonimy 2008). Residents comprise the general members of the public, including business owners, service providers, and workers / employees who service tourists' needs and and wants. It is necessary to assess the residents' perceptions of impacts from tourism on a periodic basis as the tourism-related activities can impact the residents' quality of life (Cecil et al. 2010). This also helps to keep the residents motivated to act as 'willing partners' in the tourism development process (Allen et al. 1988) and in identifying the impacts of tourism that could otherwise be overlooked (Mok et al. 1991). In promoting tourism, it is also important that visitors receive a high quality experience or high level of satisfaction from their holiday other other tourism experience which is associated with visitors' perceptions of site-specific environmental conditions and standards. These include number of parking bays, signs, levels of littering, adequacy of human waste disposal, presence of wildlife, levels of noise, and access to beach, ocean and other tourist facilities (Moore and Polley 2007). Traffic congestion can become detrimental to both tourists and negatively influence the host community's attitude towards tourism (Cros 2008).

The findings of residents' surveys and visitors' surveys provide useful inputs to the relevant institutions in crafting or improving tourism related policies and strategies such as organising business/fun events (e.g. Australian PGA championship; Triathlons at Mooloolaba and Noosa; Woodford folk festival; Kenilworth

cheese, wine and food festival; Gympie's gold rush festival; Noosa winter festival; Sunshine Coast home show and caravan and camping expo), accommodation planning, developing new tourist destinations/attractions (e.g. Premier Golf adventures; Australia zoo; Noosa national park; Suncoast barra fishing park; Kondalilla falls national park; Maleny dairies; Rainbow beach houseboats), building and improving transportation networks, and planning and scheduling air traffic/ flights. Such developments can also change residents' attitudes to tourism thus determining their level of support for tourism activities over time. However, there is a limited number of studies available which have used a longitudinal approach in assessing residents' attitudes toward tourism or visitors' perceptions of site-specific conditions and standards (Sharma & Dyer 2010; Huh & Vogt 2008). This study, therefore, focuses on the identification of residents' perceptions of different aspects of living on the Coast and investigation of differences in their attitudes towards tourism impacts between the years 2008 and 2009.

## RESEARCH OBJECTIVES

As discussed earlier, this study has the following objectives:

1. To identify whether there has been a change in the perceptions of residents on various aspects of living on the Sunshine Coast over a period of approximately 12 months.
2. To examine whether the perceptions of residents pertaining to tourism impact items on the Sunshine, Coast has significantly changed between 2008 and 2009.

## METHOD

A survey approach was used for collecting data both in 2008 and 2009. The survey was divided into the following six segments: lifestyle; priority issues; environment / tourism impacts; economy and money; perception of residents on the effect of Council amalgamation and demography; and open-ended questions on critical issues about living on the Sunshine Coast and critical issues that face the tourism industry on the Sunshine Coast. Regarding tourism impacts, originally there were 28 items in the questionnaire pertaining to tourism impacts. These were based on the items developed by Gursoy and Rutherford, (2004), and were also used by Dyer *et al.* (2007). They relate to positive or negative aspects of social, economic, and cultural dimensions; rating respondents' level of agreement on a 5-point scale (1=strongly disagree to 5=strongly agree). Of the 28 tourism impact items only 10 key tourism impact items were selected for the 2008 survey and 15 items for the 2009 survey. Their relevance and importance were decided based on consultation with the survey sponsors, the Sunshine Coast Daily and Channel 7 (local television). Thus, the perceptions of Sunshine Coast residents regarding tourism development and its impacts focused on traffic congestion; employment; noise and pollution; the natural environment; overcrowding at leisure facilities and locations; crime rates; cultural exchange between tourists and residents; incentives for the conservation of natural resources; impact on the cultural identity of the community; and parks and recreational areas for residents. The survey was administered by the Sunshine Coast Daily (SCD): 1) it was included in the daily circulation of the Sunshine Coast Daily to its regular customers, and 2) it was posted online. Altogether 1589 and 590 people participated in the survey in 2008 and 2009 respectively.

Various statistical techniques such as descriptive statistics (mean, standard deviation and frequency analysis), and a 't' test were used to interrogate the data. To ensure whether there was a response bias in the samples, mean scores for some of the items were compared for early respondents and late respondents using a 't' test. No significant difference was noted between these scores. This suggested that response bias was unlikely in the sample. The data were also checked for normality and the presence of outliers.

For testing the data validity, correlation analysis of similar items in the questionnaire was carried out.

## RESULTS

### *Respondents' profile*

Table 1 shows the comparative profile of respondents in 2008 and 2009.

**Responses to research objective 1:** *To identify whether there has been a change in the perceptions of residents on various aspects of living on the Sunshine Coast.*

In response to this objective, information was collected pertaining to various issues such as the residents' belief about the Coast in terms of living, their awareness of predicted population increase, their feelings about the predicted population growth, what they enjoy the most about living on the Coast, whether Queensland should introduce daylight saving, and the most pressing employment based issues on the Coast. Nearly 53% of the respondents indicated that they did not believe that the Coast was a better place to live now and 23% were

unsure. There has been a dramatic increase in the proportion of people who thought 'lifestyle and general pace of life' was what they enjoyed most about living on the Coast (an increase from 32.3% in 2008 to 56.4% in 2009). There has been a drop, from 40.1% in 2008 to 32.4% in 2009, in the proportion of respondents who enjoyed scenic beauty, beaches and hinterland about living on the Coast. There are four eastern states in Australia: Queensland, New South Wales, Victoria and Tasmania. There is no daylight saving in Queensland as is the case in other 3 eastern states. In response to whether Queensland should introduce daylight saving, in both surveys, over 50% of respondents supported daylight saving. However, there has been some drop in the proportion for support in 2009 (with 52.7%) as compared to 2008 survey (with 57.8%). Regarding the most pressing issue of employment on the Coast, nearly 45% of respondents in the 2008 survey, indicated a lack of senior management positions on the Coast, while in 2009 nearly 43% indicated that the key issue was the lack of employment options/job opportunities on the Coast.

Table 1  
Respondents' Profile

Particular	2008 Survey	2009 Survey
<b>Gender</b>	<b>n=1564</b>	<b>n=582</b>
Male	690 (44.1%)	231 (39.7%)
Female	874 (55.9%)	351 (60.3%)
<b>Age</b>	<b>n=1584</b>	<b>n=589</b>
Under 25 yrs	45 (2.8%)	11 (1.9%)
25-34 yrs	97 (6.1%)	27 (4.6%)
35-44 yrs	227 (14.3%)	61 (10.4%)
45-54 yrs	341 (21.5%)	160 (27.2%)
55 or more yrs	874 (55.2%)	330 (56.0%)
<b>Annual household income</b>	<b>n=1542</b>	<b>n=566</b>
Less than \$20,000	202 (13.1%)	67 (11.8%)
\$20,000 to < \$40,000	383 (24.8%)	134 (23.7 %)
\$40,000 to < \$60,000	415 (26.9%)	144 (25.4%)
More than \$60,000	542 (35.1%)	221 (39.1%)
<b>Occupation</b>	<b>n=1564</b>	<b>n=519</b>
Professional	376 (24.0%)	122 (23.5%)
Trade	71 (4.5%)	43 (8.3%)
Administrative	152 (9.7%)	59 (11.4%)
Labourer	22 (1.4%)	8 (1.5%)
Small Business Owner	155 (9.9%)	58 (11.2%)
Home Duties	197 (12.6%)	91 (17.5%)
Other	591 (37.8%)	138 (26.6%)
<b>Education</b>	<b>n=1566</b>	<b>n = 587</b>
University	611 (39.0%)	212 (36.1%)
TAFE	307 (19.6%)	123 (21%)
Apprenticeship	93 (5.9%)	35 (6%)
Secondary	519 (33.1%)	208 (35.4%)
Primary	36 (2.3%)	9 (1.5%)
<b>Location of residence</b>	<b>n=1564</b>	<b>n=590</b>
Rural area	314 (20.1%)	Coastal: 373 (63.2%)
Urban area	360 (23.0%)	Non-coastal: 207 (35.1%)
Suburban area	890 (56.9%)	Missing: 10 (1.7%)
<b>Time lived on the Coast</b>	<b>n=1572</b>	<b>n=585</b>
All my life	74 (4.7%)	36 (6.2%)
1-3 years	202 (12.9%)	64 (10.9%)
3-7 years	277 (17.6%)	93 (15.9%)
7-15 years	377 (24.0%)	151 (25.8%)
More than 15 years	642 (40.8%)	241 (41.2%)
<b>Residence: Previous Council</b>	<b>n=1566</b>	<b>n=575</b>
Noosa	184 (11.7%)	52 (9%)
Maroochy	942 (60.1%)	342 (59.5%)
Caloundra	440 (28.2%)	181 (31.5%)
<b>Residency status of respondents</b>	<b>n=1582</b>	<b>n=587</b>
Sunshine Coast resident	99.0%	98.6%
Visitor	0.9%	1.0%

**Responses to research objective 2:** *To examine whether Sunshine Coast residents' perceptions of tourism impact items have significantly changed between 2008 and 2009.*

The results showed few significant differences in the mean scores for the items considered in this study. The notable significant differences in the residents' perceptions are summarised below (see table 2 for details).

1. There was a significant increase in the level of agreement for the item "Tourism development is likely to create a positive impact on the cultural identity of the community" in 2009 over 2008. This is a favourable outcome.
2. Another favourable response in 2009 compared to 2008 related to the observation that "Tourism is likely to provide more parks and other recreational areas for local residents".

Table 2  
Test of Difference in Residents' Responses on Tourism Impact Items

Tourism impact items	2009 Survey			2008 Survey			't' value
	Mean <sup>7</sup> (SD) [n]	% who agree & strongly agree <sup>8</sup>	% who disagree & strongly disagree <sup>9</sup>	Mean (SD) [n]	% who agree & strongly agree	% who disagree & strongly disagree	
Tourism development is likely to provide an incentive for the conservation of natural resources.	3.36 (1.36) [579]	54.7	29.7	3.31 (1.40) [1558]	53.8	32.7	-0.79
Tourism is a key industry that provides essential jobs in the region.	4.5 (0.97) [585]	89.2	6.2	4.43 (0.99) [1572]	88.3	6.9	-1.54
Tourism is likely to result in more cultural exchange between tourists and residents.	3.58 (1.20) [587]	57.2	19.3	3.51 (1.21) [1563]	55.8	21.2	-1.15
Tourism development is likely to create positive impact on the cultural identity of your community.	3.40 (1.28) [585]	50.4	24.8	3.25 (1.27) [1561]	45.2	28.3	-2.47*
Tourism development is likely to provide more parks and other recreational areas for local residents.	3.21 (1.35) [582]	47.3	35.1	3.09 (1.36) [1567]	44.4	37.6	-1.8†
Tourism is likely to result in traffic congestion.	4.32 (1.06) [587]	83.3	8.5	4.46 (1.01) [1570]	86.3	6.3	2.86**
Tourism is likely to result in noise and pollution.	3.88 (1.19) [581]	67.1	14.5	4.07 (1.16) [1570]	73.9	11.9	3.42**
Tourism is likely to increase the crime rate.	3.42 (1.30) [582]	50	28.2	3.56 (1.27) [1569]	54.2	21.8	2.30*
Construction of hotels and other tourist facilities are likely to destroy the natural environment.	3.66 (1.27) [585]	60.7	21.5	3.84 (1.32) [1571]	66.9	19.4	2.91**
Tourism is likely to result in unpleasantly overcrowded beaches, bush walking paths, parks and other outdoor places in your community.	3.49 (1.30) [576]	55.6	26.2	3.73 (1.28) [1569]	63	20.1	3.80***

<sup>7</sup> Mean of five point scale: 1=strongly disagree, 2 = somewhat disagree, 3=neither disagree nor agree, 4=somewhat agree, 5=strongly agree. SD stands for Standard Deviation and 'n' stands for sample size

<sup>8</sup> Combination of 4 and 5 on five-point scale

<sup>9</sup> Combination of 1 and 2 on five-point scale

**Note:** \* stands for  $p < 0.05$ , \*\* for  $p < 0.01$  and \*\*\* for  $p < 0.001$  and † for  $p < 0.10$ .

3. There was a significant reduction in the level of agreement that “Tourism is likely to result in traffic congestion” and “Tourism is likely to result in noise and pollution”. This is perhaps due to the construction of new roads and upgrading of existing roads in recent times.
4. There has also been a decrease in the residents’ level of agreement in 2009 compared to 2008 in the following items: 1) tourism is likely to increase the crime rate, 2) construction of hotels and other tourist facilities are likely to destroy the natural environment, and 3) tourism is likely to result in unpleasantly overcrowded beaches, bush walking paths, parks and other outdoor places in the community. These changes in residents’ perceptions are favourable in terms of gaining support for further development of tourism activities on the Coast.
5. In 2009 data were recorded for five extra tourist impact items such as “tourism is likely to attract more investment to the community”, “high spending tourists are likely to affect negatively our way of living”, “the cost of developing facilities is too much”, “tourism is likely to provide more business for local people and small business”, and “local residents are likely to suffer from living in tourism destination”. Comparative analyses cannot be carried out for these at this time.
6. No significant difference in the residents’ perceptions was found between 2008 and 2009 for the following tourism impact items: 1) tourism development is likely to provide an incentive for the conservation of natural resources, 2) tourism is a key industry that provides essential jobs in the region, and 3) tourism is likely to result in more cultural exchange between tourists and residents.

## CONCLUSIONS

This study identified the changes as perceived by the Sunshine Coast residents on various aspects of living on the Coast and also investigated the difference in residents’ perceptions of tourism impacts between 2008 and 2009. In spite of using similar approaches for collecting the information in 2008 and 2009 surveys, some demographic differences were noted between these samples. This difference is perhaps explained by the ongoing growth of population on the coast affecting the collective character of the community. It could also perhaps be because of difference in the set of respondents in completing the survey. This should be taken into account when making decisions based on these findings.

In response to first research objective, the findings suggest that the proportion of people who perceive the Coast to be a better place to live is less than half of the respondents who perceive the Coast to be not a better place to live now. These findings warrant further investigation to determine expectations to develop the Coast such that it becomes more attractive not only for the tourists but also for the local residents. In the 2009 survey, a slight majority of respondents (56.5%) indicated lifestyle and general pace of life as the key aspect they enjoyed most about living on the Coast. This is a significant increase from the 2008 survey with 32.3%. The scenic beauty such as beaches and the hinterland were considered to be the key aspects that the residents enjoyed about living on the Coast in 2008 (40.1%), which decreased to 32.4% in 2009. The day light saving has been another topic of debate in Queensland. The results indicate that the support for the introduction of daylight saving has gone down to 52.7% in 2009 from 57.8% in 2008. The survey had also collected information on residents’ awareness about predicted population increase on the Coast. The results suggest that the level of awareness has significantly increased in 2009 to 84.1% from 61.1% in 2008. However, in terms of respondents’ feelings about the predicted population growth, the level of concern has more or less remained unchanged. In terms of most pressing employment based issues on the Coast, nearly 45% indicated that a lack of senior management opportunities was as the major issue in 2008 whereas the 2009 survey indicated that a lack of employment options or job opportunities was the most pressing employment based issue on the Coast.

In response to the second research objective, a ‘t’ test was carried out for the 10 common tourism impact items considered in this study. The results indicated significant differences in perceptions of residents in seven items with different levels of significance as indicated in table 3. For example, there was a significant difference in 1 item at a p-value of less than 0.001, 3 items at a p-value of less than 0.01, 2 items at a p-value of 0.05 level and 1 item at a p-value of 0.10. The residents’ perceptions of tourism impacts are encouraging for the tourism planners and developers for seeking support for tourism as residents appeared more favourable towards tourism in 2009 compared to those in 2008. For example, there is a decrease in their level of agreement in possible traffic congestion, noise and pollution, and increase in crime rates in 2009 from that of 2008. However, residents’ perceptions of tourism’s role in providing essential jobs, proving incentive for the conservation of natural resources, and the possibility of having more cultural exchange between tourists and residents have remained unchanged. In the five new items added in 2009, there is a need to carry out another survey to monitor residents’ attitudes. Generally, it is necessary to continue to receive support from local residents for tourism to inform and assist the relevant tourism institutions, local government authorities, planners and developers decision making, thus it is important to monitor such information on an on-going basis to address the concerns of local residents by making appropriate strategic interventions. Also, this research highlights the dynamism of

residents' perceptions which are influenced by changing circumstances from year to year at a local level. Regular monitoring is important to elucidate these nuances.

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## AN INVESTIGATION OF RESIDENT PERCEPTIONS ON TOURISM IN CANAKKALE: EXCUSE ME, AM I DISTURBING YOU?

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### ABSTRACT

In this research, tourism perceptions of local people have been searched for city of Canakkale which has started developing recently. To achieve this goal, questionnaires have been applied to 575 people in city center. According to the findings, it is understood that there isn't significant dependence on tourism industry in the region yet. Moreover, couldn't find any significant differences between residents whether gain income by tourism or not Similarly there were no significant differences between residents based on working in tourism industry. On the other hand, whether there are any disturbances derives from tourist behaviors and types also have been investigated. Community attachment were also examined among the respondents and found considerably high among residents.

**Key Words:** Tourism perceptions, community attachment, disturbances, factor analysis, Canakkale

### INTRODUCTION

Today multiplier effects of tourism are considerably common for the national economies, however, so as to obtain the same achievements in local and regional economy it should generate positive socio- cultural and environmental outputs as well. While opinions of the local people about tourism activities have becoming substantially significant in terms of academics researches in recent years, it is the fact that the economical importance of the tourism development has still primary importance by the governments (Tutuncu and Caliskan, 2008). No wonder that economic return of tourism which emerged by its own multiplier effects have triggering qualifications for reliable tourism development (Goodwin, 1998: 1). Still the other important key factors of tourism such as environmental and cultural might be also considerably essential for the local residents and economic outputs couldn't be allocated equally by the people in the region. Hence, investigating of residents' perceptions and opinions should be a major necessity for tourism development rather than focus on only economic effect of tourism (Dyer et al; 2006). When we investigate some previous studies it seems that most of the researchers are tended to examine whether local people feel precious coming together with tourists who are from different nations and cultures. These efforts to reveal tourism perceptions of the local communities are strengthen the great point of Pizam which stresses that economical contributions of the tourism industry couldn't be sole aim in particularly. We shouldn't forget that tourism is a bilateral event which not only locals but also covers visitors too. None of the tourist would like to encounter with inappropriate behaviors by the locals even if the destinations shines with the tremendous natural environmental and historical beauties.

### RESEARCH QUESTIONS

Aim of this study is to reveal the residents' perceptions on tourism. Besides, another major goal is to determine whether local people have any kind of disturbance derive from different tourist profiles or not. As expected, support for tourism most likely is positive in the developing regions. Therefore, we believe that it would be considerably useful to investigate perception levels of the residents in Çanakkale. For all these reasons, following research questions are purposed.

1. Do tourism perception of the residents differ depend on gender?
2. Do communities attachments of the residents differ depend on marital status?
3. Does marital status of the residents influence tourism perceptions?
4. Do tourism perception of the residents differ depend on age groups?
5. Does the house ownership make differences for tourism perception?
6. Are there any significant differences in terms of tourism perception between workers in tourism industry and non-workers?
7. Are there any significant differences in terms of tourism perception between residents who are having income by tourism industry or haven't?
8. Are there any significant positive relationships between community attachment and the length of life span?
9. Do differences at life span in the region generate different tourism perceptions?
10. Does the community attachment of the residents' robust?
11. Are there any significant differences in terms of tourism perception between highly attached and low attached residents?
12. Do the residents who live in city center have any kind of disturbances derive from different tourism profiles?
13. Are there any significant differences in terms of tourism perception between disturbed and non disturbed resident upon different tourism profiles?
14. Do tourism perception of the residents differ depend on frequencies of taking a holiday?
15. Do tourism perception of the residents differ depend on education level?
16. Are there any significant differences in terms of tourism perception between people who agree that Canakkale's distinctive culture is under the threat or not?
17. Are there any significant differences in terms of tourism perception between people who believe that coastal and picnic areas are getting crowded because of tourism activities in the region in summer seasons or not?

## **LITERATURE REVIEW**

Over the past two decades most of the researchers have investigated the relationship between tourism perception and economic reliance (Nunkoo, Gursoy, Ramkinsoon, Chi; 2009). As a result of obtaining personal economic benefits from tourism industry, local people are becoming more commitment to tourism and so higher positive perceptions are clearly appearing in the tourism region (Sirakaya et al., 2002). In study of Liu and War (1986), Kayat (2002), which were investigated to the personal reliance on tourism, were clearly revealed that the people obtained economic benefit from tourism were more supportive for the tourism developments in the region. Another important study carried out in Spain by the Garcia et al (2007). They focused on mainly create an essential tourism planning and therefore they gave substantial precedence over to learn residents' perceptions of the effect of the tourism. In the study of Tutuncu and Caliskan (2008), it is also underlined that actually, tourism regions are not only built for tourism industry but also other fundamental economic structures exist in the region. But, misconfigure processes in order that gathering rapid economic utilities, damage and almost eradicate other necessary economic activities such as agriculture in the region. In the research carried out by Gursoy et al. (2009) were found similar results with Garcia, namely, better understanding of what the local people feel about development is crucial to produce long term tourism planning. Community attachments have been investigated as a different approach in the perception studies over the past decades. As Harrill (2004) and Jurowski (1997) stressed in their studies strong attachment to the region could generate higher positive perceptions towards tourism developments. However, Lengford and Howard (1994) determine that a negative relation exists between community attachment and the tourism perception. Perceptions could be negative if the local people admit tourism problems as an agent that impacts their life qualities in the region. Indeed, Robson and Robson (1996) explain in their research that a tourism development that involves individuals, most likely to produce responsible and sustainable tourism progress and so some possible negative effects could be taken by the residents too.

## **RESEARCH DESIGN AND DATA COLLECTION**

The objectives of this research are to determine the factors and variables influencing perception levels of residents toward tourism development and clarify potential disturbances that might occur among the people who are aware of the negative economic, socio-cultural and environmental impacts that occur in time. A hand delivered questionnaires were implemented to randomly selected people. Research questionnaire was modified from Prof. Dr. Gursoy, Dr. Dyer, Dr. Carter, and Dr. Sharma who have a project namely, research project called "Resident Perception of Tourism and Associated Development on the Sunshine Coast (2004)" by the University of the Sunshine Coast. The questionnaire consists of 57 questions divided into 5 parts. In the first section of the questionnaire, 29 statements were presented so as to identify the level of agreement or disagreement of the residents with sentences about economic, socio-cultural and environmental impacts caused by tourism. In the second section of the questionnaire, 8 statements developed to define community attachment levels of the local people. The third part of the questionnaire was comprised of 3 statements, presented so as to determine social personal benefits that expected to gain by tourism development. All these three sections of the questionnaire

made up of a 5 Likert-degree type scale, ranges from (1) strongly disagrees to (5) strongly agree. The fourth and fifth section of the questionnaire are consists of questions that aims to determine categorical characteristic of the people.

## RELIABILITY AND FACTOR ANALYSIS

The coefficient of internal consistency of the total scale reliability (Cronbach's Alpha) was calculated as 0.877. It could not come across any questions which disrupting the reliability of the scale. It has also not been found negative value between values of Corrected Item-Total Correlation. The Grant mean is 3.65. The scale has collectivity ( $p > 0,05$ ). In this case, differences can be tested by using total scores. To determine individuals tourism perceptions, it has been applied Explanatory Factor Analysis and found seven factors which are independent from each other and eigenvalues' are larger than 1. Obtained seven factors consist of 67.52% of total variance. All factors are reliable. Factor loadings, mean, standard deviation and Cronbach's Alpha coefficients are shown in Table 2.

Mean scores of every single questions were found out in each factor group so as to determine the differences among tourism perceptions of the residence based on category features. While investigating of the differences according to demographic characteristic, independent double- sample t-test and for more than two groups One way Anova Test were used.

## FINDINGS

Independent double-sample t-test were implemented in order to measure whether tourism perception of the resident differ based on gender factor and couldn't find significant differences for residents' perceptions related to gender agent (for all factors  $p > 0,05$ ). Similarly, potential differences in tourism perceptions depending on marital status were investigated and couldn't find significant differences regarding the marital status (For all factors  $p > 0,05$ ). When we searched whether there are any significant differences for the tourism perception of residents depending on age, significant differences were found for Factor 6 which explains negative environmental impacts of tourism ( $F=5,154$ ;  $P=,002$  ). According Bonferroni Post Hoc test, young people ( $\leq 25$ ) have stronger perception for negative environmental impacts of tourism ( $3,95 \pm ,85147$ ).

Table 2.  
Factor loadings, mean, standard deviation and Cronbach's Alpha coefficients

Factors	Items (By the development of tourism in Canakkale)	Factor Loading	Mean	Std. Deviation	Cronbach's Alpha
F1	Tourism is likely to create more jobs for your community.	0,843	3,25	1,408	,898
	Tourism is likely to attract more investment to your community	0,841	3,09	1,312	
	Tourism is likely to provide more business for small businesses.	0,828	3,09	1,344	
	Infrastructure investments are likely to increase thanks to tourism income.	0,738	3,05	1,302	
	Tourism is likely to encourage development of a variety of economic activities by the females.	0,721	3,12	1,189	
	Tourism is likely to increase life quality.	0,697	3,25	1,265	
	Obtained returns are likely to exceed overall tourism expenditures	0,569	3,29	1,166	
F2	I would be unhappy to leave this city.	0,855	4,06	,902	,904
	I would be unhappy if my friends were leaving this city.	0,815	3,95	,995	
	I would be unhappy if I and my friends were leaving this city.	0,797	3,95	1,010	
	Distinctive culture of Canakkale city attributes to my attachment.	0,777	4,17	,900	
	No other place can compare with this area in terms of what I like to do.	0,774	3,80	1,137	
	I use this place to help define and express who I am inside.	0,733	3,84	1,033	
	I am satisfied with the quality of life when i take everything into account (eg. Family, work, leisure, personal matters)	0,690	4,23	,890	
F3	Tourism is likely to result in car parking problems.	0,778	4,06	,995	,741
	Tourism is likely to result in traffic congestion.	0,734	3,93	1,044	
	Tourism is likely to result in security problems.	0,680	3,74	1,167	
	Tourism is likely to result in unpleasantly overcrowded beaches and picnic areas.	0,594	3,64	1,053	
	Tourism is likely to result in trekking on waterfront.	0,557	3,16	1,264	
	Tourism is likely to damage historical and cultural buildings.	0,520	2,94	1,314	

	Construction of hotels and other tourist facilities are likely to destroy the natural environment.	0,462	3,12	1,297	
	The prices of goods and services are likely to increase because of tourism.	0,307	3,78	1,097	
F4	Tourism development is likely to provide an incentive for the conservation historical resources such as Gallipoli National Historical Park and Troy Ancient City.	0,781	3,85	1,087	
	Tourism development is likely to provide an incentive for the preservation of the local culture and tradition.	0,621	4,15	,890	
	Meeting people from other regions of the world is a valuable experience to better understand their culture and society.	0,615	3,88	1,002	,768
	Tourism is likely to increase local art and handicraftsmanship	0,596	3,68	1,064	
	Tourism development is likely to provide more parks and other recreational areas for local residents.	0,565	3,49	1,170	
	Tourism is likely to increase green fields.	0,476	2,83	1,181	
F5	I am being disturbed by the tourists who travel with religious themes.	0,849	2,10	1,172	
	I am being disturbed by the excursionists who travel with religious themes in Cemeteries.	0,810	2,23	1,171	,786
	Foreign tourist is likely to damage moral of our children.	0,742	1,95	1,087	
	I am being disturbed by the foreign tourist who acts according to own way of living.	0,607	2,36	1,209	
F6	Tourism is likely to increase noise pollution results from traffic congestion.	0,889	3,90	1,005	
	Tourism is likely to increase pollution of city.	0,859	3,79	1,063	,812
	Tourism is likely to increase air pollution results from traffic congestion	0,806	3,76	1,038	
	Tourism is likely to damage ecological diversity.	0,494	3,38	1,251	
F7	I feel individual happiness.	0,800	3,95	,926	
	My life quality is increasing.	0,740	3,56	1,041	,844
	I meet different people from different culture.	0,731	3,93	,984	

Extraction Method: Principal Component Analysis. Rotation Method: Varimax with Kaiser Norm.. Kaiser-Meyer-Olkin Measure of Sampling Adequacy= 0,858

When we search for the tourism perception of the residents' regarding to house ownership status, we find out that there is a significant difference for the people who pay rent fee (277 people, 48,2%) and house holders on obtaining social personal benefits ( $t=2,318$ ;  $P=,021$ ). When we investigated 146 employees who obtain direct or indirect income by tourism industry, couldn't find any significant differences (For all factors  $p>0.05$ ). We have also examined tourism perception of the residents based on working in tourism industry. Similarly there were no significant differences between two groups (For all factors  $p>0.05$ ). Another categorical characteristic of the research which is length of life span of the residents, are examined. All factors are investigated and significant differences has been found between F1 ( $F= 6,860$ ;  $P=,001$ ) and F2 ( $F=8,533$ ;  $P=,000$ ). Results are presented in the Table 3. There are significant differences between people who live in the city 4 years or less and 5 years or higher.

Tablo 3.  
Difference test according to length of life span of the residents (n=575)

Factors	N	Mean	Std. Deviation	Different groups	p
F1	0-4 years	82	3,4895	Between low than 4 years and 5-10 year	0,001
	5-10 years	118	2,9564		
	11+ years	375	3,1554	Between low than 4 years and 11+ years	0,019
	Total	575	3,1622		
F2	0-4 years	82	3,7125	Between low than 4 years and 11+ years	0,000
	5-10 years	118	3,9286		
	11+ years	375	4,0872		
	Total	575	4,0012		

Other significant factor which is “community attachment” in Table 3 shows that as the length of life span of the residents increase, community-community attachment improves in the same way. The strongest community attachment belongs to people who live in the region more than 11 year. In addition, education level of residents has been investigated in order to find out potential significant differences among the groups and differences came out in 5 factors exception of F1 and F6(  $P < .05$ ). While highest mean score for the positive economic impacts generated by level of Vocational School, lowest perception produced by level of primary school degree. In this part of the research, perceptions are re-scaled as high and low for all factors. The means are re-encoded as ‘low’ which describes 3 or lower and ‘high’ which describes higher than 3. Therefore, it is accepted that residents who have higher perception score, have stronger tourism perceptions. From this point of view, it is analyzed in whether there are differences between all factors with respect to tourism perception in Table 4.

Table 4.  
Comparison All Factors with Each Other Regarding Tourism Perception

Positive economic impacts of Tourism						
	Groups	N	Mean	Std. Dev	t	P
F2	Low	252	3,8294	,82216	-4,727	,000
	High	323	4,1353	,72704		
F4	Low	252	3,2632	,67863	12,581	,000
	High	323	3,9453	,61758		
F5	Low	252	2,2669	,89985	2,460	,014
	High	323	2,0805	,90273		
F7	Low	252	3,4749	,89798	8,695	,000
	High	323	4,0795	,72675		
Community attachment						
F1	Low	79	2,6835	1,03741	-4,600	,000
	High	496	3,2385	,98907		
F4	Low	79	3,1667	,78492	-6,530	,000
	High	496	3,7228	,68921		
F5	Low	79	2,5475	1,09565	3,459	,001
	High	496	2,1008	,85674		
F7	Low	79	3,0549	1,05197	9,030	,000
	High	496	3,9355	,75885		
Negative Socio-Cultural impacts of Tourism						
F6	Low	127	3,1594	1,01069	-7,275	,000
	High	448	3,8627	,76385		
Positive Socio-Cultural impacts of Tourism						
F1	Low	121	2,4097	,86895	-9,949	,000
	High	454	3,3628	,95341		
F2	Low	121	3,6281	,93922	-5,160	,000
	High	454	4,1007	,70621		
F5	Low	121	2,3905	1,03022	2,835	,005
	High	454	2,1013	,86023		
F7	Low	121	3,2231	,96070	-7,943	,000
	High	454	3,9721	,75740		
Disturbances derive from tourist behaviors						
F2	Low	497	4,0322	,74449	2,398	,017
	High	78	3,8040	,98494		
F3	Low	497	3,5113	,66189	-2,707	,008
	High	78	3,7772	,82686		
F4	Low	497	3,6767	,70759	2,535	,012
	High	78	3,4530	,82611		
F7	Low	497	3,8753	,81573	3,686	,000
	High	78	3,4274	1,02339		
Negative Environmental Impacts of Tourism						
F3	Low	112	3,0926	,74203	7,428	,000
	High	463	3,6574	,63250		
F4	Low	112	3,5104	,72295	-2,210	,028
	High	463	3,6793	,72625		
Personal Benefits derive from Tourism						
F1	Low	108	2,4960	,82597	-8,941	,000
	High	467	3,3163	,99046		

F2	Low	108	3,4590	1,02124	-6,489	,000
	High	467	4,1266	,65909		
F4	Low	108	3,1543	,72082	-8,235	,000
	High	467	3,7602	,68157		
F5	Low	108	2,5579	,97612	4,773	,000
	High	467	2,0707	,86391		

## COMPARISION ALL FACTORS WITH EACH OTHER REGARDING TOURISM PERCEPTION

**1-Relation between F1 and other factors:** Residents, who have high perception for positive economic impacts of tourism, have higher community attachment as well. Similarly, residents, who have high perception for positive economic impacts of tourism, are evaluated socio-cultural positive effects of tourism high as well. Likewise in other two relations, residents, who have high perception for positive economic impacts of tourism, have higher social benefits derive from tourism. Nevertheless, residents, who have perceived positive economic impacts of tourism as low, assess disturbances derive from tourist behaviors factor higher than have positive economic impacts of tourism.

**2-Relation between F2 and other factors:** Residents, who have high community attachment, evaluated the economic effects of tourism as more positive. Similarly, residents, who have high community attachment, evaluated the socio-cultural impacts of tourism as high as well. Other output from analysis is that residents, who have higher community attachment, reveal that have also higher personal social benefits derive from tourism. Although residents, who have low community attachment, indicate that have higher disturbance derive from tourist behaviors.

**3-Relation between F3 and other factors:** Residents, who have strong perception for negative socio-cultural effects of tourism, have strong perception for negative environmental impacts of tourism as well.

**4-Relation between F4 and other factors:** Residents, who have stronger perception for positive socio-cultural impacts of tourism, have higher perception for positive economic impacts of tourism as well. Similarly, residents, who have stronger perception for positive socio-cultural impacts of tourism, have higher community attachment as well. Another finding of the comparison that residents, who have stronger perception for positive socio-cultural impacts of tourism, describe that having higher personal social benefits from tourism. However, residents, who perceive the positive socio-cultural impacts of tourism as lower, have higher disturbances derive from tourist behaviors than residents who have high positive socio-cultural impacts of tourism.

**5-Relation between F5 and other factors:** Residents, who have lower disturbance derive from tourist behaviors, have stronger community attachment. Similarly, residents, who have lower disturbance derive from tourist behaviors, have stronger perception for positive socio-cultural impacts of tourism. Opposite to these outputs; residents, who have higher disturbance derive from tourist behaviors, have stronger perception for negative socio-cultural impacts of tourism. Moreover, residents, who have higher disturbance derive from tourist behaviors, indicate that have higher personal social benefits derive from tourism.

**6-Relations between F6 and other factors:** Residents, who have higher perception for negative environmental impacts of tourism, have stronger perception for negative socio-cultural impacts of tourism as well. Similarly residents, who perceive negative environmental impacts of tourism stronger, have stronger perception for positive socio-cultural impacts of tourism.

**7-Relation between F7 and other factors:** Residents, who have stronger personal social benefits by tourism, perceive the positive economic impact of tourism as higher. Correlatively, residents, who have stronger personal social benefits by tourism, have higher community attachment as well. Other important analyze is that residents, who have stronger personal social benefits by tourism, have higher stronger perceptions for positive socio-cultural impacts of tourism also. Although, residents, who have lower personal social benefits by tourism, have stronger disturbance derive from tourist behaviors compared to have high personal social benefits.

## RESULTS

In this research, it has been searched tourism perception of residences of Canakkale City whose vision covers sustainable tourism. According to the findings, it is understood that there isn't significant dependence on tourism industry in the region yet. In comparison to other precious studied that carried out by Kayat (2002), Liu and War (1986), Garcia et al. (2007) and Gursoy and Rutherford (2009), when we investigated 146 employees that obtain direct or indirect income by tourism industry, couldn't find any significant differences between residents whether gain income by tourism or not (for all factors  $p > 0.05$ ). Similarly there were no significant differences between residents based on working in tourism industry (for all factors  $p > 0.05$ ). In addition that disturbance derive from tourist behaviors have investigated and mean score found 2,16. While this respond demonstrates that the residents are not disturbed by tourist behaviors, with the question of "What kinds of tourist profile disturb you?" 22 % respondents revealed any kind of disturbances derive from tourist attitudes. Indeed, 16 % of the residents, marked to excursionist as the highest disturbance agent. Finally, community attachment has been investigated and higher positive perception such as economic, socio-cultural and personal socio-

cultural were determined through tourism. These results support the idea of Lengford and Howard (1994) that local people do not evaluate tourism as a threat.

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# LOCAL RESIDENTS' REACTIONS TOWARDS TOURISM: AN IMPLEMENTATION IN KUSADASI

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## ABSTRACT

Although tourism is often promoted as a force for positive contributions to society, economy and natural environment and governments generally believe that tourism generates new jobs, enhance community infrastructure, tourism has come under increasing criticism and scrutiny because of the alleged paucity of revenue, the inequity of benefit distribution, and the perceived social costs to resident communities. In this study, the relationship between “to be happy to live in Kuşadası” and social, environmental and economic factors are evaluated and data has been analyzed at the base of multivariate data analysis and the results are discussed.

**Key Words:** local residents, tourism, social, economic, environmental, impact

## INTRODUCTION

As tourism is very operative sector, it affects economy, social attitudes, beliefs, and values as well as the physical environment forming the cultural structure of the society and over different scales, from the individual through to communities, destinations and beyond. Although the local residents' reaction towards tourism concept has been recently gaining attention in tourism studies, the main importance is given to tourism development (Çalışkan, 2003) and the majority of research on tourism attitudes has been conducted after the development has already occurred (Harrill, 2004, Lepp, 2008). Howsoever the existing literature suggests that residents are the focal point of tourism development (Long et al., 1990, Snepenger & Johnson, 1991, Jurovski, Uysal, Williams, 1997, Garrod & Fyall, 1998, Sheldon & Abenoja, 2001, Gursoy & Rutherford, 2004, Dyer, Gursoy, Sharma, & Carter, 2006, Ambroz, 2008, Nunkoo and Ramkissoon, 2010) and of destination choice of tourists (Hoffman & Low, 1981, Korça, 1998). Therefore, tourism relies heavily upon the goodwill of the local communities' reactions toward tourism development (Jurovski et al, 1997, Yoon, 2002, Doğan, 2004) and as a result, a number of studies have investigated residents' reactions to tourism development (Liu, & Var, 1986, Um & Crompton, 1987, Ap, 1990, Prentice, 1993, Lankford & Howard, 1994, Faulkner & Tideswell, 1997, Jurovski, Uysal and Williams, 1997, Yoon, Gürsoy, Chen, 2000).

The main purpose of this study is to determine the local residents' reactions towards tourism in Kuşadası and in Turkey through a comparative approach with the study by Çalışkan (2003) to estimate if there is any significant change in years.

## LITERATURE REVIEW

Even though impact categories are not mutually exclusive and have a significant degree of overlap, it can be claimed that due to the importance of economic revenue for local people and the governments, the majority of researches have been done on the economic impacts of tourism. Developing countries consider tourism as a part of their approach to development; they tend to be less aware that tourism may also bring some negative economic effects (Mason, 2003). Even though tourists are seeking “unspoilt” landscapes and ‘authentic’ experiences (Urry, 1995), environmental affects have been reported by many studies (Carmichael, 2000; Jurovski & Gursoy, 2004; Ko & Stewart, 2002; Sheldon & Abenoja, 2001). Tourism benefits from being in a good quality environment and simultaneously environment should benefit from measures aimed at protecting and maintaining its value as a tourist resource (Mason, 2003). The tourism industry and globalization are crossing borders between nations and cultures, resulting in many socio-cultural consequences. This interaction creates new values and linkages and shapes the social roles of gender and relations between them, and forms new linkages between different cultures. We can indicate the impacts of tourism very briefly as follows (Pearce, 1989, Nunez, 1989, Crompton and Sanderson, 1990, Urry, 1990, 1991, 1995, Ryan, 1991, McLaughlin and Aislabie, 1992, Harrison, 1992, Haralambopoulos and Pizam, 1996, Brunt and Courtney, 1999, Bramwell, 2003, Beeton, 2006, Demirkaya, Çetin, 2010).

**Positive Effects:**

Economic: Development in income and life standard, new job opportunities, bringing new investments, increase the quality and quantity of infrastructure, increase in tax revenues, and encouraging the entrepreneurship  
Environmental: Environmental awareness and better environment management, qualified infrastructure (such as roads, parks, schools, etc.), restoration of historical sides and monuments, better appearance of settlements, protection of special natural sides

Socio-cultural: Creating a power for peace because of understanding the others, strengthen the societies by bringing educated people and the education possibilities, development of social and technical infrastructure, appreciation of cultural values and customs as a source of money, support for public participation and increasing the aware of being a member of that local society and culture, acculturation process likely to occur, more opportunities for women

**Negative Effects:**

Economic: Increase in the prices of products, services and real estate, increase in inflation level, low level of wages because of illiteracy, increase in the amount of import products, dependency to the tourism sector and leakage because of the international investments.

Environmental: Consumption of the nature and destruction of the economic value of resources, unsustainable land use, changes in eco-systems because of tourism facilities and activities, displating, increased pressure on existing infrastructure, increase in air, water, noise and visual pollution, change in traditional land use style, crisis in water and energy for local people

Socio-cultural: Erosion in native language, changes and assimilations in local identity and values, commodification of culture, losses in authenticity/meaning of culture, distorting the traditional way of living and hospitality, weakening of social bonds as well as family structure, cultural conflicts between the local people and the tourists.

Efforts to assess the impacts of tourism are highly important to clearly identify the boundaries of analysis and the advantages and disadvantages of the boundaries used. Thence, in tourism impact studies, for reason of difficulties to discern the impact dimensions, some models have been used. The most popular is SET, first applied to tourism by Ap (1990, 1992a, 1992b) and in this study it is also used. The SET theory means that residents benefiting from tourism are likely to perceive the industry as positive, and thus they would support the industry, while those who perceive themselves as incurring costs as a result of tourism development would display negative attitudes toward tourism, thereby opposing such development. (Perdue et al. 1990; Gursoy & Rutherford, 2004; McGehee & Andereck, 2004; Choi and Murray, 2010).

In this study, Kuşadası has been chosen because it is located closely to other main tourism centers, tourism development model in Kuşadası is similar to other tourist settlements, and thus the results of the study may highlight some important data and result in some further similar studies for the other tourist destinations. Another important reason to conduct this study is to examine the previous results of Çalışkan (2003) and this is the importance of the study. Because repeated measures allow for general statements of change over periods of time and this indicates the importance and originality of the study as well.

**METHODOLOGY**

The survey focused whether any changes occurred in years within relationships that create satisfied residents in Kuşadası. In the questionnaire, the factors, which were used to evaluate local residents' reactions focus specific elements that residents count important. In order to overcome this issue, a summary question is utilized; measuring an overall happiness level of living in Kuşadası. The question is presented by the statement as, "Overall, I am happy to live in Kuşadası". With the inclusion of this statement, a comparative analysis is expected to result.

The data were obtained by administrating a structured-questionnaire. The questionnaire adopted from the questionnaire used by Doğan Gursoy et al (2000). The adopted questionnaire instrument is consisted of two parts. The first part involved 39 Likert type survey items regarding social, economic, and environmental effects. The seven point Likert scale was used in this part, ranging from "definitely agree (7)" to "definitely disagree (1)". The second part involved 4 questions regarding basic demographic characteristics of the respondents. The survey instrument was pilot tested among 40 residents. The pilot results were used to improve the clarity and readability of questions. The study was carried out in three stages; theoretical investigation, data collection and data analysis. The sample size initially was decided to be Proportionate Stratified Random Sampling as each

segment of the population would be better represented (Sekaran 2000). The data obtained was analyzed by SPSS (Statistical Program for Social Sciences) program. Data analysis consisted of descriptive statistics, factor analysis and regression analysis between dependent variable and independent variables.

## RESEARCH FINDINGS

The descriptive statistics indicate that results of survey refer both gender perceptions with a ratio of 44,4 % female, 55,6 % male participation and mainly urban and suburban inhabitants' reflections towards tourism are enclosed. The reliability tests on independent variables have been implemented on data at the base of derivative statistics and Cronbach Alfa and Kaiser – Meyer – Olkin sample values are found respectively 0,89 and 0,85 which are acceptable result. Due to factor analysis eight factors are revealed with a total variance explained 63,20%. These factors are; “Internal Environment and Tourism Supply” related with crime rate, infrastructural qualities, public culture and advertising of destination, “Emotional Devotion to Kuşadası”, “Negative Environment – Social Effects” created by tourists, “Negative Social Effects” like traffic jam, prostitution, increase in violence, “Economic Expectations” on future job and income effects, “Economic Effects”, “Positive Cultural Effects” and “Current Economic Conditions” factors. The P values of all the factors are less than 0.05 that mean that participants find the questions of the factors related to each other. In other words the questions are basically more or less on the same matter in all factors. Due to the Alpha Values, the questions measuring the factors have strong inner relations, only the alpha of Current Economic Conditions factor indicates weaker relation between the questions explaining the factor.

Table 1  
Results of Factor Analysis

FACTORS	Eigen-Value	Variance Explained	Alpha	p
1. FACTOR: Internal Environment and Tourism Supply	7,926	20,858	0,90	0,000
2. FACTOR: Emotional Devotion	5,533	14,561	0,83	0,000
3. FACTOR: Negative Environment Social Impacts	3,238	8,522	0,86	0,000
4. FACTOR: Negative Social Impacts	1,891	4,976	0,83	0,000
5. FACTOR: Economic Expectations	1,548	4,075	0,64	0,000
6. FACTOR: Economic Impacts	1,545	4,065	0,70	0,000
7. FACTOR: Positive Cultural Impacts	1,213	3,193	0,60	0,000
8. FACTOR: Current Economic Conditions	1,123	2,956	0,53	0,000

Barlett's Test of Spirity= 0.001

Kaiser-Meyer-Olkin Measure of Sampling Adequacy =0,85

Total variance explained= 0.63205

To understand whether demographic variables have differences among each other, T-test is applied and it is revealed that women and men have different perceptions to Internal Environment and Tourism Supply, Negative Social Effects, Positive Cultural Effects. Women are much more positive (sensitive) about the internal environment and tourism supply while men are much more related with negative social effects and positive cultural effects. Additionally, marital status makes difference only for Negative Environment – Social Impacts. Married individuals' perceptions are more negative than the single ones'. To understand the impacts of “Internal Environment and Tourism Supply”, “Emotional Devotion”, “Negative Environment – Social Effects”, “Negative Social Effects”, “Economic Expectations”, “Economic Effects”, “Positive Cultural Effects”, “Current Economic Conditions” factors on the dependent variable which is “I am happy to live in Kuşadası”, regression analysis is carried out. Generally, the significance level of regression is accepted to be less than 0,05 to consider a correlation statistically significant. In the regression model the p value is less than 0,001 indicating the model is reliable and significant with F value (113,646) and Signif. F. (0,000), Multiple R (0,840) and R<sup>2</sup> (0,706).

Table 2  
The Results of Regression Analysis

	Beta	t	Sig.
Internal Environment and Tourism Supply	0,144	4,223	0,000
Emotional Devotion	0,877	26,472	0,000
Negative Environment – Social Effects	-0,135	-3,57	0,000
Current Economic Conditions	-0,103	-3,17	0,002
CONSTANT	0,376	0,884	0,378

Multiple R= 0,840

R Square= 0,708

Adjusted R Square= 0,7042

F: 113,646

Signif F.= 0,000

With the data obtained by regression analysis it is seen that that independent variables explain the dependent variable with 70,42 percent which is very good ratio. On the other hand; it is seen that Internal Environment and Tourism Supply ( $b=0,144$ ,  $\text{sig.}=0,000$ ), Emotional Devotion ( $b=0,877$ ,  $\text{sig.}=0,000$ ), Negative Environment – Social Effects ( $b=-0,135$ ,  $\text{sig.}=0,000$ ) and Current Economic Conditions ( $b= -0,103$ ,  $\text{sig.}=0,000$ ) factors explain the dependent variable but the other factors (Negative Social Effects, Economic Expectations, Economic Effects, Positive Cultural Effects) don't explain. Due to the beta values, first two variables have positive impact while the last two have negative impacts on happiness to live in Kuşadası.

## CONCLUSION

Tourism is one of the biggest sectors in the global economy and it has become very important social and environmental issue, not only economic issue and the complex effects of tourism make it almost impossible to evaluate these effects completely.

By the survey, it is revealed that gender causes differences in their perception of internal environment issues such as crime rate, society culture, quantity and quality of parks, recreation zones, schools. This can be considered as a result of “traditional” family structure, in which mothers take care of babies and children and naturally are much more sensitive in their choices of social environment and conditions considering their children. Similarly, married individuals are much more concerned about negative environmental–social impacts related with the family life such as noise, natural destruction, crowded streets, and new living styles conflicting with the traditional way of living. The happiness of the residents is affected by the internal environment, environmental and social impacts which are related family and children, and the economic conditions necessary for supplying their life and emotional links to Kuşadası. Results point out that issues related with family affect their happiness positively while economic conditions affect negatively pointing out that economic conditions are not satisfactory. Also, people don't ignore negative social and environmental impacts of tourism and the natural and social destruction diminishes happiness highlighting an increase in natural awareness as a contradiction with the previous results.

The results pointed out these important changes occurred in Kuşadası residents attitudes:

- In consequence of unsatisfied expectations, economic expectations have no significant effect on happiness of residents anymore. Current economic conditions have effect on happiness but on a negative base meaning people think that economy is not well enough to supply a good life to their family. It also may be interpreted that people do not have “hope” for future of destination; they think it is already in bad condition and will be bad, even worse.
- After years, Kuşadası has become more “special” place for its residents. It indicates with years spent in destination increases, devotion increases. The most significant difference between the previous study and this one is that “Emotional Devotion” factor was not an efficient factor on happiness, however now it is the strongest positive factor.
- Instead of social structure, family is in the focal point. The social structure is still important through it affects the family members. Correspondingly, it is emphasized that the negative social corruption is obvious and it is important that even though they still are economically dependent on tourism and tourists, the negative impacts of tourism cannot be ignored anymore. However, it would lead to more sound results in the following studies. The results would be examined by conducting studies in different destinations, which are in economically good position or not dependent on tourism economy, i.e. which have diversified economy.

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# ECOTOURISM, FOR OBTAINING SUSTAINABLE ECONOMIC INCOME (CASE STUDY: BISHE WATERFALL IN KHORAM ABAD)

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## ABSTRACT

Ecotourism is one of the types of tourism, being used by tourists for the purpose of enjoying by attending the nature and observing its attraction, hunting and wild-life. As Khoram Abad is selected as a tourism area by the United Nations, the city of Bishe may be considered as a source of sustainable economic income. Ecotourism's purpose is receiving sustainable tourism, keeping natural resources and maintaining the environment. Therefore, it is tried to state desired results for planning and target management in the field of sustainable economic environment in tourism, by using descriptive and analytical ways and field studies.

**Key Words:** Ecotourism management, Economical sustainable development, Khoram Abad, Bishe Waterfall.

## INTRODUCTION

Today, ecotourism is one of the new activities in economy. Including profitable effects, rather than social and cultural ones. It is useful, if, it shall be possible to supply needs and satisfaction of tourists and obtaining maximum economical profits for host society and lowest damages and problem for regional environment. Tourism industry attracts travelers. It means making profit and income for those organizations, spending many for tourists. Most societies are providing in each country (Bemanian, 2009). On the basis of different motives, such as ecotourism, tourism is one of the spread economical activities. By providing new economical opportunities, it can animate social, economical and cultural activities of native societies. Developing ecotourism shall improve social and economical life of people and removing poverty, increasing utilization. So, the best kind of tourism is sustainable one (Bemanian, 2009).

Tourism is increasingly regarded by many governments as providing an opportunity for the regeneration of their weak economies, and by the less developed countries as a means of facilitating their economic development. However, to assume that the positive economic effects of tourism will always be stable in any community is risky for several reasons. First, the tourism industry is an unreliable one that is highly seasonal and employment in the tourism sector is often characterized as low skilled, poorly paid and low status and is generally unstable in long term. Second, tourism demand can be easily affected by external factors. These may be political upheavals, terrorist threats or unusual climatic and environmental (Azimi, 2005).

## RESEARCH METHODOLOGY

This method is descriptive and analytical one, using field studied, for planning in this area.

## ECOTOURISM CONCEPT

It's meaning and sensitivity into ecological problems and paying attention into tourism and environment has been started in 1960, s. Hetz was the first person, described this term in 1965 and considering the relation between tourists, environment and native cultures (Zahedi, 2006).

Ecotourism is considered as tourism in which traveler or tourist's visits natural landscape and environment and virgin grounds. Natural tourists emphasize on natural or environmental attraction. Actually tourists want to go inside beautiful nature and admire natural attractions (Mahdavi, 2003).

Ecotourism is one of the fastest growing sections of the global tourism industry and it has created a strong market among environmentally aware tourists. It is also popular with government authorities and conservation bodies since it can provide simultaneous environmental and economic benefits (Azimi, 2005). But comprehensive definitions or concepts of ecotourism are as following:

Responsible travel to natural areas which conserves the environment and improves the welfare of the local people

## **EFFECTS OF ECOTOURISM ON SUSTAINABLE ECONOMY**

Nowadays, most countries try to provide necessary facilities to grow tourism industry, as tourism activities is considered as main source of getting income. In developing countries, tourism is main source of income even more than oil-based revenue (Gharehnejad, 1995.) in rural region named Khoramabad, domain economy is agriculture. Because of limitations of agriculture and increasing population, it seems that in future such economy will not meet subsistence and needs of people, so it is necessary to pay attention to building- job within other sections of economy. As this region located in rail- station and cross- roads and has beautiful and attractive landscape to attract ecotourists and create related jobs to delivery services and provide sustainable economy

Importance of ecotourism based on economy has following aspects:

- 1- Providing attraction of foreign currency to improve national economic.
- 2- Variation of regional economy particularly in rural region in where agriculture should be insufficient or different so it facilitates diversity jobs.
- 3- Ecotourism builds job in regional areas. This building job directly has effects on tourism and concerned to support or resource management.
- 4- It improves transport network, infrastructure factors and communication (Azad manjiri, 2008).

Ecotourism is considered as effective tool for sustainable development to grow tourism industry and is profitable and real industry to get billion dollars income. At present, application of this section is different from other sections tourism industry because ecotourism has significant results to improve sustainable development (Bemanian, 2009).

Destinations of ecotourism in all levels should be consistent with sustainable development (Bemanian, 2009). Economical benefits involve new jobs, job growth, increasing income, new products, improved infrastructure, economical diversity in local economic and opportunities to link tourism to other services or products. Native economical profits include regional profitable industry, such as residing facilities, restaurants, transportations organizations, seminar centers, entertainment, souvenirs, handicrafts and guidance services. (L,Ejel, 2009)

As, obtaining eco tourism require sustainable activities in any fields (environmental, social, cultural, economical), so it is necessary to recognize tourism area, for achieving this important factor. In this part, we are going to consider natural and human characteristics of Bishe waterfall. Also, it is necessary to consider this planning in this field.

According to Lindberg and McKercher (1997), there are various stakeholders within the ecotourism industry from operators to protected area managers and local communities that have to be considered in the economic analysis of this business activity. They highlighted the growing problems that accrue from protected areas in relation to economic benefits, as the number of competing sites and opportunities for ecotourism have expanded both within and between countries. Ecotourism has been seen as a source of revenue to offset declining public sector subsidies, to manage conservation and, in some cases, to replace declining economic activities such as forestry.

## **EFFECT OF RISK MANAGEMENT ON SUSTAINABLE TOURISM ECONOMY**

Risk is an important factor affecting the Development of tourism as one. Tourism risk management is a systematic approach to making decisions under conditions of uncertainty, dealing with the total risk, by anticipating possible opportunities and accidental losses, and designating and implementing procedures that minimize;

- 1) The occurrence of loss, and/or
- 2) The social, economic and environmental impact of the losses that do occur.

Business has been using tools to manage environmental risk for some time. There is now increasing emphasis on the economic and social aspects of the triple bottom line of business.



Tourism developing risk can lead to unsustainable development of tourism, so tourism managers should evaluate the risk of Tourism development and implement risk management (yaoqing, 2010)

With the rapid development of economy, many regions are actively developing tourism. Many tourism managers have received good benefits of economy, society and environment, but some failed in many tourism projects, and they suffered enormous losses. (yaoqing, 2010)

### CASE STUDY

Bishe waterfall is located in a forest- mountain – in Zagros chain mountain- area in Lorestan province, being in 60 Km of Khoram Abad. Bishe waterfall has considerable natural characteristics. Forest, mountain and river are 3 important factors in natural ecosystem. In addition, nomadic, their camps and domesticated animals shall attracted people, as anthropology attractions.

Natural facilities and ecotourism effect on them. Lorestan statistics indicates most tourism come into this city in summer and spring. At the first of autumn, this statistic is very low. Cold climate of this province and its topography shall be a cause of decreasing the number of places. So, it is emphasized to potential facilities of province in all seasons. For example, making sling pist, as a result of suitable mountain is considered as solutions.

Geographical condition, climate condition, vegetarian factors, different kinds of animals and natural landscape of Bishe waterfall Khoram Abad indicates tourism parts of region. Economical dimension is the condition of sustainable income. Tourism earn more and more economical income, needing human, financial resources and equipment, raw materials and technology, ecological structures and pay attention into management system, people and their participation in investing process and tourism activities, related rules about attractions, education and residents in this area.

Figure 1

Bishe waterfall



On east of Bishe waterfall, mountains of Kolahkuh and on the north of it, Ozgan mountain is located. Paryan Spring rural is located in east and we can see it from high lands of waterfall. In addition, relationship between Bishe rural and waterfall has important feature. Roaring rivers and supply lakes of waterfall and mountain-forest region surround waterfall are considered as geographical features.

**Tourism location of Bishe waterfall:**

As Bishe waterfall is considered as tourism region, by study on waterfall and region around it and by reorganization of environmental characteristics, ecology, social aspects it seems that tourism industry based on development and improving ecotourism and demography or significant aspect. At present, no planning or conditions is not set for this purpose. Travelling and immigration of nomadic and black covers attract visitors and passers and many intend to be familiar with customs and style of life. All want to know that in technology and power ear, how nomadic live and how they spend free times without watching TV. Focusing on tourism in demography field beside ecotourism and cultural heritage of architecture and objects of antecedent can facilitate diversity of tourism within different seasons. More important, existence of available networks of rail road has effect on development and improvement of ecotourism and demography.

**Transportation situation of Bishe waterfall:**

Locating of this waterfall in Lorestan province on west of Iran and relation of this province with neighbor provinces and access to west south and Persian Gulf and access to central region of country and Tehran are important. Also, in around of waterfall Bishe rural and railway, access to transportation is available. Bishe waterfall is located near railway station and has access to transportation means and so has significant advantages. Long ago years, access to waterfall and Bishe rural was through railway train. Although many people from Khuzestan and Lorestan and far province went this region. Nowadays, because of access to transportation far from 60 Km of Khoram Abad, every year especially in summer, tourists are travel to this region.

**Economical risks in Bishe waterfall:**

People of Bishe village have high mental condition hospitalization, as a result of continued relation with tourist in railway station and travelling them in rural region and around waterfall and adopt with these condition. People of this village rent their hose to tourists and welcome them in their house. Consequently, presence of tourists in this rural region increases incomes and improve economic statues.

Welcoming to investment on region to attract more tourists by people reveals that they are satisfied by presence of tourists and intent to communicate with them directly and this fact is reasonable when they become more satisfied by economic interaction to tourists.

There are many risks in difference of field such as economic, social, political and environmental sectors. In addition to cultural hospitalization of local people and their tendency to attract of tourism. Economical risks in this case study are

Economical risks in Bishe waterfall are such as:

- 1- Lack of local people ability to invest in tourism activities
- 2- Nothing proper education and training of human resources in tourism section
- 3- Deficiency of suitable infrastructure in order to attraction of tourists and ecotourists.
- 4- Lack of investment by government and private organizations.

**CONCLUSION**

As mentioned early, tourism is considered as new economic activities and in addition, there are social and cultural aspects. Tourism has high value since not only it provides satisfaction and meet needs of tourism but also, it has economic benefits and less destroy and problems for community and environmental nature. As main goal of tourism is sustainable in particularly sustainable of economy, ecotourism should be source of economic income of this region which provide path to achieve goal, but we need to plan in all levels. One of these levels is planning of economic section. Economic evaluation of this region show that superior economy of region is agriculture and farming is main proportion of region economy. On the other hand, because of limitation of farming grounds and increasing population, this section of economy will not meet subsistence economical of people in future, so building- job is necessary in other economic section and as it occurred in field and retrospective study, waterfall of Khoram Abad is one of seven beautiful waterfall of this province and for location of this waterfall in path of train station and access to other natural beautiful region and ecotourism, creating job related to delivery services to tourism can provide conditions for sustainable economic.

**In this light some suggestions are presented as:**

- 1- It is important participate local people to ensure achieving sustainable ecotourism however local societies play main role in sustainable tourism, also we should not ignore the roles of government organizations and private states (NGO,s).
- 2-Visitors are essential factors in sustainable development. Their expectations are depending on their motives and it can be different.
- 3-It is necessary to assessment and evaluation ecotourism regions providing demand tourism and it should prevent building unsuitable and expensive infrastructure and equipments which was caused alterappearance and eliminate of ecotourism attractions.
- 4-Conducting effective activities that cause sustainable tourism such as:compiling information, determine capacities, education of nature operator, familiarity with environmental hazard and method of their management, providing of infrastructure and requirement of technology emphasizing on environmental.
- 5-Identify environmental and ecotourism potentials having appropriate marketing and advertising planning in order to attract tourists and reduce investment risks when decrease tourists in different seasons.
- 6-Standardization environmental, social criteria and ecotourism infrastructure in this area to financials risks.

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