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Multilevel Approach to Competitiveness in the Global Tourism Industry

Sérgio Jesus Teixeira and João Matos Ferreira

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Multilevel Approach to Competitiveness in the Global Tourism Industry

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The search for understanding the multilevel approach to competitiveness in the global tourism industry has led to a separation of approaches such as the characteristics of the general and competitive environment. The globalization, the companies' transformation, the emergence of the digital company, and the evolution of the tourism and hospitality industry represent four powerful drivers of change modifying business environments worldwide (Laudon & Laudon, 2007; Salem, 2014). In a world increasingly influenced by globalization, broad markets make it difficult for companies to cope with rapid change and increasing competition using only their skills, capabilities, and resources. As such, it is crucial to establish long-term relationships with other organizations, thus entering networks to help cope with any gaps or difficulties encountered in the markets.

The principal goal of this study is to identify the role of knowledge management organizational processes as a determinant of competitiveness in the hotel industry, particularly how knowledge management strategies centered on the source (internal and external) and knowledge (tacit and explicit) have a positive impact on the competitiveness of hotels. Authors use a quantitative approach based in an email survey applied to 55 Portuguese hotels. Results show that the knowledge management strategies oriented to source and type of knowledge are critical for hotels' competitiveness and obtaining competitive advantages. This will help hotel managers better understand how to align the knowledge management strategies in order to improve hotel competitiveness. This chapter is among the first research into the links among knowledge management strategy, based on knowledge source (internal, external) and type (tacit, explicit) and hotel competitiveness, an integrated framework.

The aim of this chapter is to propose new tools – based on USALI and on the most relevant operating ratios – to support the management of micro and small hotels that are not integrated into hotel chains. The methodology starts with literature review, which allowed to point out some USALI schedules that are not being used, a lot of items of USALI schedules without relevance and a set of operating ratios and indicators highlighted by researchers and professionals. The first result consists in the proposal of seven simplified hospitality management accounting schedules (revenue and cost items). The second result is an operating scorecard that includes the ratios and indicators useful for micro and small independent hotels.

Rural tourism increases income sources for rural residents, reduces rural population outflow, and preserves cultural traditions. This chapter considers development of agrotourism in a rural region like the Omsk region, and agrotourism potential of each Omsk district is assessed. To assess the agrotourism potential, integral and rating indicators were calculated using secondary data and the assessment of 40 experts. The analysis allowed a rating of Omsk's municipal districts. Based on the results, the Southern forest-steppe zone has the highest potential for the development of agrotourism. Several other districts present good conditions to increase the potential of agrotourism development. Some districts are distinct, but conditions for the development of agrotourism exist in all areas of the Omsk region.

In a constant evolution of the global economic sector over the past 50 years, conditions to create more job opportunities and offer business services have remained timeless in many respects but subject to significant change as well. Tourism as an international industry and as the biggest provider of jobs on the planet boasts a greater array of heterogeneous stakeholders than many other industries. It is necessary to utilize all available information resources to make decisions, especially in the age of agglomerate economies. And further attention should be given towards understanding how marketing intelligence can support tourism companies to increase their competitiveness. This chapter was developed in two phases: (1) identification and (2) analysis. A literature review was made through the electronic database Scopus.

As a growing trend and sustainability tool, characterizing consumer concern, behavior, and intentions

Preface

This book aims to contribute to the advanced knowledge in business competitiveness with principles in intelligent practices namely in the tourism sector. This book also looks for contributions that would give new insights and advances to the literature of the area of tourism competitiveness in a multilevel approach. Encouraging the development of collaborative networks, based on the dissemination of information at the level of R&D carried out, transfer of knowledge and technology to the tourism sector, production of joint publications (Academia-Sector), demonstrating through case studies the best practices and solutions available, this book is a priority.

This book is about the tourism industry and academia must capture significant value through the adoption of smart strategies to improve the opportunities and success of tourism businesses to increase their competitiveness. Companies compete with each other to gain public notoriety every day. A business undoubtedly involves creativity and innovation in the way they compete. Skills and capabilities should serve as a basis for adopting new advances in competitiveness driven by business tourism (Teixeira and Ferreira, 2018). The development of infrastructure and centers of excellence capable of responding to new market needs, combined with improved global network capabilities, will enable companies to be more innovative and competitive in the global market (Carmichael, 2002; Knezevic Cvelbar, Dwyer, Koman, & Mihalic, 2016).

The first chapter, "Introduction: Multilevel Approach to Competitiveness in the Global Tourism Industry," by Sérgio Teixeira and João Ferreira focuses on competitiveness of tourism industry by offering an overview of the tourism competitiveness and how it faced in a global and multilevel perspectives.

Chapter 2 undertaken by Pedro Veiga, Filipe Ambrósio and Raúl Ribeiro, "Competitiveness of Hotel Industry: A Knowledge Management Approach," identifies the role of knowledge management organizational process as a determinant of competitiveness. The authors show how knowledge management strategies focused on the knowledge have an impact on the competitiveness of hotel industries.

Chapter 3, "What Are the Challenges of Cyber-Physical Models in the Tourism Business?" by Silvia Fernandes, reflects on how the firms are positioned in terms of digital transformation, through the Internet of Things (IoT) in tourism context.

Chapter 4 by José Vargas-Hernández, Jovanna Cervantes-Guzman, and Elba Lizbeth Guerra, "La Barranca del Rio Santiago as a Tourist and Eco-Touristic Attraction for the Brand Guadalajara," seeks to know if the Rio de Santiago canyon is an ecotourism and tourist attraction consequently that it can be included as a brand.

Chapter 5, "Critical and Inhibiting Success Factors in Interorganizational Networks: A Case Study," by Viviana Durão and António C. Moreira, involves analysis of a tourism company (as case study) of creating an inter-organizational network and to perceive what was done for the selection and creation of the strategic partnerships and inter-organizational network and what can inhibit these partnerships.

Chapter 6, "Omnichannel in Tourist Shopping," by Alba García-Milon, Emma Juaneda-Ayensa and Cristina Olarte-Pascual, discusses the need to begin the empirical study of the role of omnichanneling in tourist shopping, with the aim of increasing our understanding of tourist behavior in this emerging scenario.

Chapter 7 by Soraia Garcês, Margarida Pocinho, and Saul N. Jesus, "Psychological Wellbeing as a Creative Resource for Businesses in the Tourism Industry: A Multidisciplinary View," focuses on the idea of Psychology applied to the tourism industry and particularly, the study of psychological wellbeing as a key factor for the competitiveness of the field.

Chapter 8, "Post, Ergo Sum: Social Media and Brand Competitiveness in Tourism – The Case of Molisn't," by Anna D'Auria and Marco Tregua, analyses the online actions and counteractions to describe the role of the actors and the modalities by which they reacted. Literature showed a growing interest in the ties among destination marketing, destination image and competitiveness, and social media.

Chapter 9, by Jorge Ramos and Ana Cláudia Campos, "Tourism in a Salt Pan: Does Creativity Matter?" aims to introduce the reader to iconic salt production places around the world which are also tourist attractions.

Chapter 10, "Entrepreneurship and Innovation in Tourism E-Business: Their Relationship With Their Audiences," by Pedro Álvaro P. Correia, Irene G. Medina, and Zahaira G. Romo, presents a qualitative and exploratory analysis of the individuals in the virtual context of the social media, their behaviors, reactions and attitudes, with the intention of perceiving which social factors can enhance the appearance of competitive advantages for the organizations.

Chapter 11, "Heritage as a Source of Competitive Advantage: Lessons From Madeira," by Antonio Almeida, Luiz P. Machado and Tiago P. Silva, utilizes the case of Madeira region to examine the potential impact of heritage tourism in the development of tourism products.

Chapter 12 by João Lopes and Luis Farinha, "Knowledge and Technology Transfer in Tourism SMEs," analyses the dynamics underlying the mechanisms of knowledge transfer and technology between academia and the tourism industry.

Chapter 13, "What Do We Know About Destination Branding?" by Rafaela C. Malerba, Cristina I. Fernandes, and Pedro M. Veiga characterizes the intellectual structure of the scientific publications about destination branding, and identifies its author's location in terms of institution and countries and recognizes main research lines.

Chapter 14 by Luís L.Santos, Conceição Gomes, and Cátia Malheiros, "Achieving a Competitive Management in Micro and Small Independent Hotels," proposes new tools – based on Uniform System of Accounts for the Lodging Industry and on the most relevant operating ratios – to support the management of micro and small hotels that are not integrated into hotel chains.

Chapter 15 by Kirill Postevoy, Paula O. Fernandes, Olga V. Kosenchuk, and Alcina M., "Agrotourism as an Opportunity to Enhance the Development and Competitiveness of Rural Areas," aims to identify, measure and assess the prerequisites for the development of agrotourism in the districts of Omsk rural region (Russia Federation).

Chapter 16, by Ronnie Figueiredo and Marcela S. Castro, "How Can Marketing Intelligence Support Tourism Companies to Increase Their Competitiveness?" explores how marketing intelligence can support tourism companies to increase their competitiveness.

Chapter 17 by Joana Bica, Jorge Julião, and Marcelo Rudolfo C. Gaspar, "Applicability of Circular Economy in the Hospitality Industry: Consumers' Perception," aims to explore and approach consumers' awareness and preferences towards circular economy and sustainability-oriented hospitality industry practices.

The last chapter (Chapter 18), "Tourism Policies and the Investment Dynamics of Micro-Level Firms: The Way Forward to Regional Tourism Development? The Case of Portugal," by Rui Costa and Carlos Costa, analyses how the investment dynamics of small and micro-sized enterprises in the tourism sector can contribute to the creation of a strong and dynamic business sector.

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We would also like to thank IGI Global Publishing for the opportunity to do this book and the anonymous referees for their constructive feedback and insightful comments given to the book contributors. Last but not the least, we would like to thank editorial review board for their helpful comments and discussions.

To my godchildren Nádia and Martim.
To my mum Serafina Mendes Jesus Teixeira.

Sérgio J. Teixeira

To my family and friends

João J. Ferreira

Chapter 1
Introduction to the Multilevel Approach to Competitiveness in the Global Tourism Industry

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ABSTRACT

The search for understanding the multilevel approach to competitiveness in the global tourism industry has led to a separation of approaches such as the characteristics of the general and competitive environment. The globalization, the companies' transformation, the emergence of the digital company, and the evolution of the tourism and hospitality industry represent four powerful drivers of change modifying business environments worldwide (Laudon & Laudon, 2007; Salem, 2014). In a world increasingly influenced by globalization, broad markets make it difficult for companies to cope with rapid change and increasing competition using only their skills, capabilities, and resources. As such, it is crucial to establish long-term relationships with other organizations, thus entering networks to help cope with any gaps or difficulties encountered in the markets.

INTRODUCTION

The search for understanding the multilevel approach to competitiveness in the global tourism industry has led to a separation of approaches such as the characteristics of the general and competitive environment.

The globalization, the companies' transformation, the emergence of the digital company, and the evolution of the tourism and hospitality industry represent four powerful drivers of change, which is modifying business environments worldwide (Laudon & Laudon, 2007; Salem, 2014).

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In a world increasingly influenced by globalization, broad markets make it difficult for companies to cope with rapid change and increasing competition based only on their skills, capabilities and resources. As such, it is crucial to establish long-term relationships with other organizations, thus entering networks to cope with any gaps or difficulties encountered in the markets.

The new trends in the industry ('fourth Industry') introduce what has been called the smart platforms, in which cyber-physical systems monitor the physical processes of a business and make decentralized decisions. These systems include IoT and communications, either between machines or through machine-human interactions, in real-time via wireless web. Given the speed of technological change and its impacts in the business model's change, these issues should be addressed.

In addition, it is a very interesting and appropriate sector for experiences on cyber-physical systems and platforms because of its adherence to mobile-online-personal interactions for smart tourist-destination services (Babu and Subramoniam, 2016; Bismart, 2017). More and more tourism and travel brands tend to develop 'experience platforms' in order to support travel experiences that enable travelers to know and share the culture, heritage and people of the local communities they visited or want to visit.

New technologies have changed so many aspects of our lives that it is hard to imagine being without them. The mobile phone, tablet, computer and other smart devices give us a sense of security and help us make good decisions in our daily lives. It is increasingly unusual to find someone who will take an initiative without first consulting one of these devices, which can be thought of as new extensions of ourselves. This is clearly seen in the field of shopping, where consumers take advantage of the wide variety of channels to obtain the maximum information possible, make the best decisions and share their experiences before, during and after buying products and services.

The production of salt has been related to human life from its beginning. Since ancient times, salt has been used for preserving food, seasoning or pharmaceutical products, and applied in the production of many daily commodities (Kurlansky, 2011). Thus, from early times salt has had utilitarian value. Salt is still one of the preferred and the most widespread methods used in the preservation of food (Bjørndal et al., 2016).

In the new century, advances in technology have brought tremendous changes to consumers, markets, and marketing. These new technologies allow connection and interaction between individuals. The tourism sector is one of the most affected by this new reality, as indicated by data from different studies on Internet users and tourism (Devis, 2010). Many companies have not yet integrated the new technologies into their processes, even when they assume they will depend on them; prefer to continue operating as usual, with a high opportunity cost compared to competitors (Correia et al., 2014).

There is a growing awareness that mature destinations efforts to assure a high level of competitiveness in the international market are increasingly dependent on its ability to achieve an outcome on the current attempts to foster the cultural heritage sector (Catrina, 2016; Garrod and Fyall, 2000; Hall and Williams, 2008).

However, the relationship between cultural heritage, tourism development and destination competitiveness remains an under-researched topic with respect to peripheral areas beyond the Mediterranean Basin (Alberti and Giusti, 2012; (Teixeira et al., 2019; Teixeira, Lopes Casteleiro, Rodrigues, & Guerra, 2018), owing to overwhelming focus on traditional touristic hotspots benefiting from centuries-old layers of archeologic, architectural, historical and cultural artefacts and traditions (Chhabra, 2010; McGrath et al, 2016).

Knowledge transfer has a major impact on economic and socio-cultural systems, especially as it influences innovation management at its core. Today, higher education institutions play an increasingly important role in the knowledge economy in terms of production and dissemination of knowledge (Teixeira, Veiga, & Fernandes, 2019).

Although higher education institutions are aware of their role in terms of knowledge creation, the general perception remains that higher education institutions are not related to practical realities and everyday business practices. As such, the transfer of academic knowledge to the industry is an emerging concern for academics and businesses (Hardy, A., Vorobjovas-Pinta, O., & Eccleston, R; Kathoefer & Leker, 2012).

Tourism is a very important activity for many countries, regions and cities, which promotes economic, cultural, environmental and social positive impacts when properly planned and managed. Many destination managers believe its resources are enough to interest and retain tourists, however, nowadays, the competitiveness and the complexity in consumer-behavior are so strong, that a destination needs much more than good attractions, structure and services. Besides, tourist offices and companies' managers need to maintain their travel markets in a context where potential tourists are overwhelmed in marketing messages (Pritchard and Morgan, 2001).

Hotels incorporated in hotel chains benefit of a multi-level management support structure. This is not the case of independent hotels acting alone but competing at the same level, that is, on a global scale. In many countries, micro, small and medium-sized companies mostly compose the hospitality industry. Given this reality, it is crucial to provide these hotels with management tools to support decision-making in order to increase their competitiveness.

Agrotourism is the sector of the tourist industry-oriented to use natural, cultural, historical and other existent resources of rural areas and its features for the creation, growth and development of a complex tourist product. Being considered a subset of rural tourism the concept is more complex and presents a vast socio-economic and landscape impact (Lupi, Giaccio, Mastronardi, Giannelli, & Scardera, 2017; Dubois, Cawley, & Schmitz, 2017). The creation of jobs and, therefore, the enhancement of employment among the residents is one of the main positive social impacts of rural tourism.

In a constant evolution of the global economic sector over the past fifty years, conditions to create more job opportunities and offer business services have remained timeless in many respects but subject to significant change as well. Tourism as international industry and as the biggest provider of jobs on the planet boasts a greater array of heterogeneous stakeholders than many other industries. Tourism has been a phenomenon characterized by balance or harmonious relationships between organizations and tourists. It is considered as a group of people and places providing touristic services.

A consumer is changing extensively, making more inquiries, creating or joining social media networks, and writing reviews. It is time to understand the new consumerism in tourism. Recently, they are creating a specialized technologically sophisticated market.

Since the launch of commercial internet applications in the early 1990s, many researchers have noted the potential of the World Wide Web, especially in business. The internet is immensely important for business in any economic sector. In the 20th century, globalization of capitalism, movement of populations, and advances in transportation and communication technology have helped to develop tourism into one of the world's largest industries (Choi & Sirakaya, 2006).

Current society lives in constant demand for new product and service consumption, contributing to significant resource scarcity, environmental problems and consequent climate changes and impacts (Antikainen et al., 2015). As a result, the traditional linear economy model, focusing on extraction-transformation-utilization-disposal (MacArthur, 2015) is no longer efficient or sustainable in the current social and environmental context. For this reason, there is an effective need to reduce resource consumption and achieve higher environmental and economic efficiency, creating incentives to improve the global value chain from the production of a service or product to the consumer, creating new opportunities, economic competitiveness and resilience for businesses (Blake, Sinclair, & Soria, 2006; Camisón, Forés, & Puig-Denia, 2016; Vanka & Heijman, 2013; Villasalero, 2017).

The idea that higher education institutions can contribute to increasing the competitiveness of regional economies has been emphasized in recent decades. Starting in 2014, there was a paradigm shift in regional policies implemented in Europe. These new policies are called research and innovation strategies for smart specialization (RIS3). We will use a qualitative methodology, analyzing two SMEs in Portugal in the tourism sector. You want to check how the knowledge and technology transfer academy is carried out in the tourism sector. The importance of the creation of networks for tourism SMEs in the creation of competitiveness and wealth will also be determined.

In many countries, small and medium-sized companies mostly compose the hospitality industry. Given this reality, it is crucial to provide these hotels with management tools to support decision-making in order to increase their competitiveness. The lodging industry is a crucial contributor to global tourism revenues in many countries, reaching a very significant percentage of GDP and of direct and indirect employment. Thus, knowledge flows are an important element in the performance, competitiveness and innovation of tourism organizations. These streams of knowledge fall into two categories. Knowledge can flow intentionally through the (managed) "transfer of knowledge" or unintentionally through "knowledge overflows".

The hotel managers demonstrated a high degree of satisfaction using USALI to define costs, profitability analysis of products, pricing and profitability analysis of the markets. These authors have also determined the factors that influence the adoption of USALI, such as competitiveness in promotion, size (number of employees) and when the decision-making is carried out at operational level.

However, Kirichenko (2014) refers that, nowadays, in the Omsk tourism industry it is possible to identify the following factors that negatively influence its development: the low competitiveness of accommodation facilities, poor infrastructures, the presence of improper information about Siberia, prevailing stereotypes, the differences between the proposed services and the level of actual incomes, weak intersectoral collaboration, a small selection of offers in the tourism sector and the the low quality level of services provided.

Rural tourism is one of the fastest growing economic segments that deals with challenges and opportunities of global competitive market. Sustainable development is mostly understood as a holistic concept with complex interrelation between social, economic, and environmental aspects of development.

At the regional level, there is a direct cross-referencing between the creators of innovation and the users of innovation, regional prosperity thus depends on the capacity of a region to identify and offset the shortcomings in tourism competitiveness, innovation and clusters as applied to regions (H. S. C. Choi & Sirakaya, 2006; Medina-Muñoz & Medina-Muñoz, 2014; Slocum, 2016; Ye, Xiao, & Zhou, 2019).

The management capacities, existence of tourism programs, cooperation between the public and private sectors, spa and wellbeing resorts, tourism information and guidance, casinos, nightlife, and the usage of e-commerce rank among the aspects fundamental to the competitiveness of any destination (Armenski, Marković, Davidovic, & Jovanovic, 2011). According to Armenski et al. (2011), the vision of the destination as regards the values of tourism, residents, stakeholders and the community also emerge as factors essential to tourism competitiveness. Other important characteristics of competition also include the recreational installations, congress tourism, rural tourism, the existence and effectiveness of teaching tourism, the efficiency of tourism companies and the hotel sector, the appropriateness and relevance of tourism and hotel training as regards the needs of visitors, company recourse to information technologies, and the specific social tourism policies (Batle, Orfila-Sintes, & Moon, 2018; H. M. Choi, Kim, Kim, & Agmapisarn, 2018; Daniel Barrera-Fernández, 2017; Mihalič, 2000; Niewiadomski, 2015; Wang & Chang, 2005).

CONCLUSION

In summary, this book on multilevel approach to competitiveness in the global tourism industry is a timely intervention to document different segments and shades of tourism competitiveness in multilevel approach and global industry, which may be of value to scholars, policymakers, development partners, students and youth as well as the general public. This chapter focused on the role of competitiveness in the global tourism industry by highlighting its distinguishing characteristics that will be discussed further in the book.

The importance of competitiveness in the global tourism industry will be highlighted in the chapters that acknowledge the historical events that have shaped current business practices. Thus, the book will stress how the distinctiveness of multilevel approach to competitiveness in the global tourism industry provides an interesting field of research. The emerging issues for future research will also be stated that emphasise the need for a contextual understanding of multilevel approach to competitiveness in the global tourism industry.

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Chapter 2
Competitiveness of the Hotel Industry:
A Knowledge Management Approach

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ABSTRACT

The principal goal of this study is to identify the role of knowledge management organizational processes as a determinant of competitiveness in the hotel industry, particularly how knowledge management strategies centered on the source (internal and external) and knowledge (tacit and explicit) have a positive impact on the competitiveness of hotels. Authors use a quantitative approach based in an email survey applied to 55 Portuguese hotels. Results show that the knowledge management strategies oriented to source and type of knowledge are critical for hotels' competitiveness and obtaining competitive advantages. This will help hotel managers better understand how to align the knowledge management strategies in order to improve hotel competitiveness. This chapter is among the first research into the links among knowledge management strategy, based on knowledge source (internal, external) and type (tacit, explicit) and hotel competitiveness, an integrated framework.

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INTRODUCTION

Globalization, the companies' transformation, the emergence of the digital company, and the evolution of the tourism and hospitality industry represent four powerful drivers of change, which is modifying business environments worldwide (Laudon & Laudon, 2002; Wu & Lin, 2009; Salem, 2014). Knowledge management arose in the last decade of the twentieth century to become one of the most debated management concepts (Hallin & Marnburg, 2008). A company's value increasingly incorporates intangible assets, allowing them to create competitive advantages and differentiate themselves from competitors, to ultimately succeed through knowledge and its management.

The hotel industry is one of the main components of tourism. As such, being one of the most promising sectors in Portugal, it requires strategies that can increment the country's economic growth. In Portugal the commercial balance of travel and tourism (% of GDP) has been growing from 3.6%, in 2013, to 5.9% in 2018 (63.9%), and the exportations (% of GDP) has been increasing by 51.9% (5.4% in 2013 and 8.2% in 2018).

Between 2013 and 2017, the number of hotels in Portugal grown 26.0% (1,039 in 2013 and 1,309 in 2017) and the number of overnight stays increased 52.6% (26,100,320 in 2013 and 39,827,049 in 2017), which contributes to a higher level of competition in this industry.

Therefore, hotels should focus on clients' needs and desires, as well as on recognizing internal factors that can boost their competitiveness. Hence, hotels should implement adequate strategies, such as knowledge management, to face markets' strong competitiveness and, consequently, improve their performance, increase occupation rates and make profit. The dynamism and agility required by hotels are only viable if compatible with a full and active organizational memory, in which knowledge is created, fluently circulates and naturally grows (Fraj, Matute, & Melero, 2015).

Despite not being considered as knowledge-intensive, hotels sell services whose processes require knowledge. Thus, the knowledge of both the organization and its employees is crucial to follow the markets' evolution and the shifts in clients' needs. The knowledge of the workforce or the knowledge of the organization that is expressed in routines and databases, among others, are elements that effectively develop the business in a competitive environment (Latilla et al., 2018). In the same way, a learning and innovation-oriented mindset is crucial for the competitiveness of the hotels (Fraj et al., 2015). Hotels' performance can be improved by identifying and sharing useful knowledge (Davenport & Prusak, 1998). However, in the hospitality industry, knowledge management has not reached the same scale of empirical research as in other fields (Cepeda-Carrion & Cillo, 2019; Hallin & Marnburg, 2008; Ragab & Arisha, 2013; Salem, 2014). Therefore, the main goal of this study is to identify the role of knowledge management organizational processes as a determinant of competitiveness in the hotel industry. As secondary objectives, we intend to evaluate how knowledge management strategies focused on the source (internal and external) and knowledge (tacit and explicit) may have an impact on the competitiveness of hotels.

The proposed methodology is based on a survey answered by hotel directors in Portugal, which collected data on knowledge management processes and competitiveness.

This study will make two relevant contributions. Firstly, we fill a research gap by providing both theoretical and empirical supports for the links among knowledge management strategy, based on knowledge source (internal, external) and type (tacit, explicit) and firm competitiveness in one integrated framework. Secondly, this research was applied in hotel industry, a sector with intense competition and growth.

The rest of this paper is organized as follows: Section 2 presents the theoretical framework and the development of the research model. Section 3 describes the methodology used in the work. Section 4 presents the results. The discussion of results and conclusions are presented in Section 5 and finally in Section 6 the limitations of the study and future lines of research are pointed out.

THEORETICAL BACKGROUND AND RESEARCH MODEL

Knowledge Management

The definition of knowledge has a high range from the practical to the conceptual and philosophical and from a restricted range to a wide range (Anand, 2011). For Nonaka and Takeuchi (1995) knowledge is a justified belief in the truth, which is a function of a special position, perspective or intention; implies an action, being specific to a given context and dependent on unique points of view, personal sensitivity and experience. Davenport and Prusak (1998) define knowledge as a fluid mix of shared experiences, values, contextual information and the specialized knowledge that provides a framework for its use for incorporation into new experiences and information. For Erden, Von Krogh and Nonaka (2008) the concept of knowledge is linked to a belief justified in the truth, that is, individuals need to justify the veracity of their observations based on the observations of the world, and it is the ability to define a problem and act accordingly. Knowledge is constituted as a mixture of consciousness, perceptions and feelings that define and make products unique, exclusive, innovative and timeless, as well as a source of organizational competitive advantage (Latilla et al., 2018). Regarding the accessibility of knowledge, Nonaka and Takeuchi (1995) divide knowledge into two groups, tacit knowledge and explicit knowledge. Tacit knowledge, the most complex form of knowledge, is developed and internalized by the knower over a long period of time, it is almost impossible to reproduce in documents or database, it incorporates accumulated knowledge, it is not easily articulated and it corresponds to a cognitive dimension which reflects an image of reality and a vision of the future (Alavi & Leidner, 2001; Barley, Treem, & Kuhn, 2018; Ibrahim & Reid, 2009; Nonaka & Takeuchi, 1995; Wang, Wang, & Liang, 2014). The explicit knowledge, formal and systematic, corresponds to knowledge that can be easily communicated through words, numbers, codes, formulas, etc. (Alavi & Leidner, 2001, Anand, 2011, Barley et al., 2018, Davenport & Prusak, 1998), Du Plessis (2007), Durst & Edvardsson, 2013, Grant, 1997, Nonaka & Takeuchi, 1995, Wang, Wang, Cao, & Ye, 2016; Wang et al., 2014).

Knowledge management refers to the strategic value of knowledge oriented to practices that lead an organization to succeed (Barley et al., 2018), focusing on the creation and distribution of knowledge in organizations through technologies such as the internet, intranets and e-mail (Alvesson & Karreman, 2003), covering a variety of processes, practices and systems present in organizational contexts designed to gain value through the application and use of knowledge (Barley et al. 2018, Teece, 1998). Knowledge management is a management function that creates or locates knowledge, manages the flow of knowledge and ensures that knowledge is effectively and efficiently used for the organization's long-term benefit (Gloet & Terziovski, 2004). This should be structured and planned approach to explicitly and systematically manage the creation, sharing, collection and use of knowledge as an organizational asset in line with its business strategy, to increase a company's capacity, as well as speed and effectiveness in delivering products or services for the benefit of customers (Anand, 2011; Du Plessis, 2007).

An appropriate knowledge management strategy is important to ensure that a company creates, acquires, accesses and uses knowledge in a timely manner (TH Kim, Lee, Chun, & Benbasat, 2014), it must be aligned with the organizational process, the culture and the implementation of information technology related to knowledge management (Bagnoli & Giachetti, 2014, Choi, Poon, & Davis, 2008), dealing with issues of technical and structural management in an organization (Singh, 2018). An appropriate knowledge management strategy leads to competitive advantages and better organizational performance.

One of the most relevant knowledge management strategies is based on the source of knowledge and can be disaggregated into two dimensions: an interior-oriented and externally oriented strategy (Bagnoli & Giachetti, 2014, Choi & Jong, 2010, Choi et al., 2008; Coombs & Hull 1998, TH Kim et al., 2014, Singh, 2018). The development of internal knowledge and access to external knowledge exhibit two relevant facets of the development of corporate knowledge (De Clercq & Dimov, 2008). In the internal orientation strategy, the emphasis is placed on the creation, sharing and accumulation of knowledge within an organization (Wang et al., 2016) and ways in which knowledge can be captured from existing sources and technological systems to support the decision (Choi et al., 2008; Singh, 2018). An organization can not only act in the process of knowledge created and shared within its boundaries, but also absorb and employ the knowledge outside the organization (Bagnoli & Giachetti, 2014, De Clercq & Dimov, 2008; et al., 2016), namely by researching secondary data sources, drawing on experts and consultants, and entering into strategic cooperation agreements with clients and other organizations, namely suppliers and competitors (Singh, 2018).

Another approach to the knowledge management strategy focuses on knowledge and follows the division of knowledge postulated by Nonaka and Takeuchi (1995): tacit knowledge and explicit knowledge. Knowledge management strategies focus on the two perspectives - explicit transmissible and codifiable knowledge or tacit background knowledge (Nonaka and Takeuchi, 1995). The explicit-oriented knowledge strategy attempts to improve work efficiency through the coding and use of knowledge through IT infrastructures (Choi et al., 2008; Singh, 2018; Wang et al., 2016), while the strategy oriented towards tactical knowledge pays more attention to knowledge that cannot be dissociated from its behavioral component (Keskin, Akgün, Ayse Günsel, & Imamoglu, 2005; Zhong & Song, 2008), activated through person-to-person contacts and socialization processes (Choi & Jong, 2010, Choi et al., 2008, Keskin et al., 2005, Wang et al., 2016).

KNOWLEDGE MANAGEMENT IN HOTEL INDUSTRY

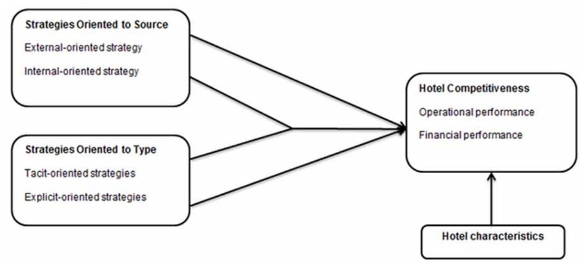
Due to the hospitality industry being knowledge-intensive as a consequence of the intense use of technology and the essence of the product and service, based on the interaction between the employees and the customers (Chalkiti, 2012, Hallin & Marnburg, 2008; Marco-Lajara, Claver-Cortes, Úbeda-García, García-Lillo, & Zaragoza-Sáez, 2019; Salem, 2014) - nowadays, exist diversity research in the hospitality industry (Bouncken, 2002, Chalkiti, 2012; Ferrary, 2015; Hallin & Marnburg, 2008; TT Kim & Lee, 2013; Marco-Lajara et al, 2019; Martínez-Martínez, Cegarra-Navarro, & García-Pérez, 2015; Nieves & Diaz-Meneses, 2018; Pusck, Kramer, Bandeira & Freire, 2019; Salem, 2014, Shaw & Williams, 2009, Sigala & Chalkiti, 2015; Yang, 2015; Yang & Wan, 2004). In the hospitality industry, knowledge is related to the company's customers, products and services, operational work procedures, problem-solving and competitors' situation and behavior (Shamim, Cang, & Yu, 2017, Shaw & Williams, 2009; Yang & Wan, 2004).

Knowledge management in the hotel sector is centered on a structured and planned approach, oriented to systemically manage the flow of knowledge as an organizational intellectual asset (Bouncken, 2002; Shamim et al., 2017), continually improving the knowledge of employees about customers unique needs (Shaw & Williams, 2009). Knowledge management plays a key role in the success of hotels and in gaining competitive advantages (Bouncken, 2002; Martínez-Martínez, et al. (Hallin & Marnburg, 2008; Shaw & Williams, 2009), and in the development of quality standards for hotels (Hallin and Marnburg, 2008). (T. T. Kim & Lee, 2013), with the creation of new products/services or in the promotion of the offer of customized tourist experiences to customers (Tzortzaki & Mihiotis, 2012). The establishment of knowledge sharing, and maintenance is fundamental to the best knowledge management practices (Shamim et al., 2017), being relevant to the technological and non-technological infrastructure, not forgetting that sometimes and only can be found in the head of the people (Yang, 2015).

In order to implement knowledge management strategies, a survey of existing and necessary knowledge sources and types should initially be carried out (Bouncken, 2002; Tzortzaki & Mihiotis, 2012). Hotels are currently increasingly dependent on their competence to possess internal and external knowledge, making knowledge a critical resource for competitiveness and obtaining competitive advantages for innovation and differentiation of its competitors (Bouncken, 2002; Marco-Lajara et al., 2019, Shaw & Williams, 2009, Wilkea et al., 2019). The fundamental knowledge for the provision of the hotel service is based on the internal knowledge of its employees, the cooperation between them and the synergistic complementarity of knowledge (Bouncken, 2002, Sigal & Chalkiti, 2015, Tzortzaki & Mihiotis, 2012). The strategies of management of internal knowledge in the hotel industry are based on the creation, transfer and distribution of intra-organizational knowledge have an emphasis on the accumulation and preservation of the knowledge of its employees and the technological systems and on the existence of redundant knowledge maintained between different employees of hotels (Bouncken, 2002). The internal knowledge management, together with the creative processes of the employees have a decisive role in the incremental innovations of the sector, namely in creating experiences beyond the expectations of the clients, trying to anticipate their needs (Marco-Lajara et al., 2019; Sigala & Chalkiti, 2015; Tzortzaki & Mihiotis, 2012). In general, hotel employees have extensive knowledge of the sector, sometimes acquired in competitors and is often overlooked, since managers sometimes focus on collecting information from customers, suppliers, and competitors who are prone to ignore employees' knowledge (Yang, 2015). Hotel managers and staff, because of proximity and direct contact with customers are more likely to acquire knowledge of these, as knowledge flows are more direct and faster, allowing for more in-depth information about their desires, needs and preferences and market trends (Nieves & Diaz-Meneses, 2018, Salem, 2014, Wilkea et al., 2019). These knowledge flows are a potentiator of the generation of ideas and incremental innovations, since the knowledge and suggestions provided by clients are related to the hotel's current services, practices, tasks or activities (Nieves & Diaz-Meneses, 2018; Wilkea et al. al., 2019). Hotel managers and staff, because of proximity and direct contact with customers, are more likely to acquire knowledge of these, as knowledge flows are more direct and faster, allowing for more in-depth information about their desires, needs and preferences and market trends (Nieves & Diaz-Meneses, 2018, Salem, 2014, Wilkea et al., 2019). These knowledge flows foster the generation of ideas and incremental innovations, since the knowledge and suggestions provided by clients are related to the hotel's current services, practices, tasks or activities (Nieves & Diaz-Meneses, 2018; Wilkea et al., 2019). Currently, some of the customer-oriented knowledge acquisition processes are obtained through central information and reservation systems (Bouncken, 2002). The systematic involvement of hotels in strategic cooperation networks aimed at creating and transferring knowledge within the tourism sector, is a key factor in the diversification of business and the generation of radical innovative ideas. (Nieves & Diaz-Meneses, 2018; Shaw & Williams, 2009; Tzortzaki & Mihiotis, 2012; Wilkea et al., 2019). The external social relations of managers and hotel staff are a source of external knowledge of hotels, and contacts with various communities (outside the company) and exposure to diverse information and perspectives develop creativity by contributing to innovation (Sigala & Chalkiti, Wilkea et al., 2019). In addition, the management of external knowledge obtained through the cooperation networks of companies in this industry should mitigate the uncertainty of totally uncontrollable events and adapt to external changes, diversifying opportunities, anticipating trends and, above all, encouraging the transfer of knowledge through the organizational structure (Nieves & Diaz-Meneses, 2018). However, for an effective transfer of external knowledge, it is necessary for the hotel to have internal structures that allow the dissemination and sharing of this knowledge (Nieves & Diaz-Meneses, 2018).

Tacit and explicit knowledge also has the dominant role in hospitality service operations (Bouncken, 2002; Chalkiti, 2012, Hallin & Marnburg, 2008, Salem, 2014 and Shaw & Williams, 2009). The implicit orientation to the processes illustrates the relevance of tacit knowledge in the hotel industry (Hallin & Marnburg, 2008; Salem, 2014), which is a dynamic and constantly changing environment (Hallin & Marnburg, 2008). For an effective creation, sharing and use of tacit knowledge, proximity is essential for the development of strong levels of trust and common values, since they require direct and reciprocal interaction (Bouncken, 2002; Shaw & Williams, 2009). In the hospitality sector, this flow of personal knowledge is carried out through direct communication, meetings between the management team and the rest of the workforce, sharing of emails, training and practical experiences in the work context, which gives trainees the possibility to observe, imitate and test skills and to incorporate routines (Bouncken, 2002, Hallin & Marnburg, 2008, Salem, 2014). When employees have a high level of experience and skills, they tend to increase the efficiency and the productivity of other colleagues and hotels can manage their tacit knowledge through the creation of employee profiles or the creation of corporate lists of employees with the specification by a specific area of knowledge (Salem, 2014). An effective tacit knowledge management strategy is essential for hotels to create innovative products and to be able to successfully develop in the constantly changing tourism market (Bouncken, 2002, Shamim et al., 2017, and Shaw & Williams, 2009). The ability to motivate employees with high levels of skills to convert their tacit knowledge, namely the knowledge of specific tasks, into knowledge acquired explicitly documenting and with a repository increasing the memory and organizational knowledge of the hotel (Shamim et al. 2017, Shaw & Williams, 2009). Likewise, the possibility of intense communication with the client strengthens the relevance in the hotel industry of the existence, for the operations, of explicit knowledge management (Salem, 2014). The explicit management of knowledge is extremely relevant for hotel chains when they need to re-acquire the knowledge developed from the experience of others through the spatiotemporal boundaries (Chalkiti, 2012) and in particular in the explicit description of all routines for hotels to be almost capable of operating independently of specialized human knowledge (Salem, 2014). However, technology transfer, which implies a high level of tacit knowledge, can fail if it is managed at a distance, since it requires a close and fluid connection between those who transfer knowledge and those who receive it, so explicit knowledge is necessary to restore and disseminate knowledge in hotel chains with globally dispersed hotels and can be a way to avoid problems of high turnover and instability of work in the industry (Chalkiti, 2012, Salem, 2014). For hotels, a hybrid strategy is recommended, since some tacit knowledge, namely routines embedded in services, can only be transferred through direct personal relationships and innovation arises also from the simultaneity of explicit and tacit knowledge management (Bouncken, 2002; Salem, 2014).

Figure 1. Research model



Research Model

The literature review reveals that a correct organizational knowledge management strategy oriented to the source of knowledge (internal and external) and to the type of knowledge (tacit and explicit), particularly in the hotel industry, increases the achievement of competitive advantages and organizational performance. Figure 2.1 shows the research model.

METHODOLOGY

Data Collection

The population of this study includes all Portuguese hotels. The unit analysis of this study was the hotels and the data collection were done through a structured questionnaire, which was answered by the Hotel Managers. In terms of the sampling strategy, an electronic data survey was sent to the emails included in a database of 700 Portuguese hotel directors' contacts. Data were collected in February and March 2019, 55 hotel managers answered the questionnaire, producing a response rate of 7.9% and corresponding to 4.2% of hotels located in Portugal. The sample consisted of one one-star hotel and other with two-star, 8 three-star hotels, 26 four-star hotels and 19 five-star hotels.

Measurement

For the delineation of the questionnaire, existing scales were used and adapted to align them with the context of the hotel industry. All items in the survey are evaluated with a seven-point Likert-type scale ranging from 1 to 7. Measures of tacit-oriented knowledge management and explicit-oriented knowledge management was based on scales developed and validated by Z. Wang et al. (2014). Scale of external-oriented knowledge management and internal-oriented knowledge management was based on measures developed and validated by Choi et al. (2008) and Z. Wang et al. (2016), and scales of operational performance and financial performance was developed and validated by C. L. Wang et al. (2015) and Z. Wang et al. (2016). The full measurement items are displayed in Appendix.

To account for differences between hotels, hotel age, hotel integrated in a group (No; Yes); client origin (% Foreign), region location (Norte, Centro, Lisboa, Alentejo, Algarve, Autonomous Region of Madeira; Autonomous Region of the Azores) and category (1 to 5 stars) were included in our research model as a control variable. These variables were selected because of its potential impact on firm performance.

Data Analysis

To describe the sample considered, the descriptive statistics (means and standard deviations) of the variables included in the research, as well as the respective correlations, were computed. With regard to the modeling of the knowledge management strategies and control variables that influence the company's competitiveness, it was used multiple linear regression. For the estimation of the standard errors of coefficients we used robust standard errors to eliminate possible problems of heteroscedasticity. In all the regressions, the existence of variables with potential multicollinearity effects through variance inflation factors (VIF).

All data were analyzed with IBM-SPSS software version 25.0 (IBM Corporation, New York, USA).

RESULTS AND DISCUSSION

About hotel sample description, 36.4% (20) were located in the Lisbon region, 23.6% (13) were located in the Algarve and 12.7% (7) in the Autonomous Region of Madeira, the three main Portuguese tourist regions. The hotels had been operating on average for 20.1 years, 56.4% (31) hotels were integrated into a hotel group and, on average, 66.2% of the guests came from international markets.

Table 1 show the results referring to descriptive statistics (mean and standard deviation), Pearson's correlations between all the variables used in the study and VIF of predictor variables.

In relation to the factors that have impact in hotel competitiveness, modeled through multiple linear regression (Table 2), the model I and model V shows that hotel's age have a significant impact in operational performance (Model I: $B = 0.02$; $p < 0.05$; Model V: $B = 0.01$; $p < 0.05$), as well as, in model V, the antiquity of the hotel has a significant impact on financial performance ($B = 0.01$; $p < 0.05$).

Regarding strategies oriented to source of knowledge, Intern-oriented knowledge management present a significant impact in operational (Model I: $B = 0.54$; $p < 0.05$; Model IV: $B = 0.90$; $p < 0.05$) and financial performance (Model I: $B = 0.64$; $p < 0.05$; Model IV: $B = 1.92$; $p < 0.05$), as well the Extern-oriented strategy express a statistical effect in operational (Model I: $B = 0.29$; $p < 0.05$) and financial performance (Model I: $B = 0.11$; $p < 0.05$; Model IV: $B = 0.36$; $p < 0.05$). The higher the orientation for these strategies, the higher is the competitiveness of hotels. This results support that hotel services are based on close contact between the employee and the client, the management of internal knowledge, specifically the creation, sharing and accumulation of knowledge and the ways in which knowledge can be captured from as well as the use of existing sources and technological systems, plays a decisive role in hotels gain a competitive advantage (Bouncken, 2002; Marco-Lajara et al., 2019; Shaw & Williams, 2009; Sigal & Chalkiti, 2015; Tzortzaki & Mihiotis, 2012 Wilkea et al., 2019). The management of external knowledge also plays an important role in achieving superior performance. A greater fluidity in the extraction of the clients' knowledge allows to obtain a more detailed information about their needs (Nieves & Diaz-Meneses, 2018; Salem, 2014; Wilkea et al., 2019) and the existence of strategic alliances to create and transfer knowledge within the tourism sector has an impact on the competitiveness of hotels (Nieves & Diaz-Meneses, 2018; Shaw & Williams, 2009; Tzortzaki & Mihiotis, 2012; Wilkea et al., 2019). It should be emphasized that for an effective transfer of external knowledge, it is necessary the hotel have the internal conditions that make it possible to create, transfer and use knowledge (Nieves & Diaz-Meneses, 2018).

As regards to strategies oriented to type of knowledge, tacit knowledge management present a significant influence in operational (Model IV: $B = 0.41$; $p < 0.05$) and financial performance (Model I: $B = 0.39$; $p < 0.05$; Model IV: $B = 0.37$; $p < 0.05$), and Explicit-oriented strategy expose a statistical effect in operational (Model I: $B = 0.29$; $p < 0.05$) and financial performance (Model IV: $B = 1.16$; $p < 0.05$). The higher the orientation for these strategies, the higher is the competitiveness of hotels. These results show that the explicit-oriented and tacit-oriented knowledge management also has the dominant role in hospitality service operations (Bouncken, 2002; Chalkiti, 2012, Hallin & Marnburg, 2008, Salem, 2014 and Shaw & Williams, 2009). The implicit orientation to the processes illustrates the relevance of tacit knowledge in the hotel industry, which is a dynamic and constantly changing environment (Hallin & Marnburg, 2008; Salem, 2014). An effective tacit knowledge management strategy is essential for hotels to be able to successfully develop in the constantly changing tourism market (Bouncken, 2002, Shamim et al., 2017, and Shaw & Williams, 2009). The explicit management of knowledge is extremely relevant for hotel chains when they need to re-acquire the knowledge developed from the experience of others through the spatiotemporal boundaries and particularly the explicit description of all routines for hotels to be almost capable of operating independently of specialized human knowledge (Chalkiti, 2012; Salem, 2014). For hotels, a hybrid strategy is recommended, since some tacit knowledge, namely routines embedded in services, can only be transferred through direct personal relationships and innovation arises also from the simultaneity of explicit and tacit knowledge management (Bouncken, 2002; Salem, 2014).

Finally, the interaction terms between strategies oriented to source and type of knowledge shows that exist a statistically significant impact of interaction between internal and tacit orientations (Model V: $B = 1.58$; $p < 0.05$), external and tacit orientations (Model V: $B = 1.58$; $p < 0.05$), external and explicit orientations (Model V: $B = 1.78$; $p < 0.05$). These results show that there is a multiplier effect on the competitiveness of hotels resulting from the use of combined knowledge management strategies oriented to the source and type of knowledge.

CONCLUSION AND DISCUSSION

There is also an emerging research agenda on knowledge management within the hotel sector. The principal goal of this study is to identify the role of knowledge management organizational processes as a determinant of competitiveness in the hotel industry, particularly how knowledge management strategies centered on the source (internal and external) and knowledge (tacit and explicit) have positive an impact on the competitiveness of hotels.

Our results show that the knowledge management strategies oriented to source and type of knowledge are critical for competitiveness and obtaining competitive advantages.

To improve competitiveness hotels, need trusts internal knowledge when faced with troubles, encourages employees to bring forwards work-related suggestions and cultivates professionals from inside. The hotels need to collaborate with external institutions or organizations in R&D, to solve problem with the help of external experts, to acquire new knowledge from outside media such as internet to gain new knowledge from customers and alliance. Our results have implications in terms of hotel knowledge

Table 1. Mean, standard deviation (SD), correlations between the variables and VIF

	Mean	SD	1	2	3	4	5	6	7	8	9	10	11	12
(1) Operational Performance	4.82	0.93	**NA**											
(2) Financial Performance	4.83	1.21	.786*	**NA**										
(3) Hotel age	20.13	18.21	.265	.193	**1.29**									
(4) Integrated in a group	0.56	0.50	-.011	.091	.018	**1.57**								
(5) Algarve	0.24	0.43	-.071	-.022	.077	-.028	**1.50**							
(6) Lisboa	0.36	0.49	-.059	-.039	-.156	.132	-.421*	**1.85**						
(7) Category (stars)	4.11	0.85	.132	.029	-.045	-.363*	-.021	.037	**1.32**					
(8) International market (%)	66.22	25.14	.051	.036	-.269*	.389*	-.019	.361*	-.023	**1.78**				
(9) External	5.22	1.06	.815*	.615*	.231	-.049	-.087	-.142	.111	.108	**6.71**			
(10) Internal	4.69	0.99	.713*	.458*	.059	-.044	-.073	-.070	-.025	.113	.666*	**2.64**		
(11) Explicit	4.91	0.94	.343*	.307*	.138	-.098	-.078	.054	-.008	.044	.364*	.275	**1.29**	
(12) Tacit	4.81	1.24	.442*	.174	.171	-.129	.033	-.117	.115	.125	.792*	.411*	.428*	**3.77**

Note: * $p < 0.05$; NA – Not Applicable

management practices, emphasizing that the decision makers in this industry should have a high focus on the consideration of external and internal factors of the company when formulating knowledge management strategies.

Respectively to strategies connected to knowledge type, the hotel employees need frequently to share knowledge based on their experience, expertise and lessons from past failures, and to collect knowledge of know-where or know-whom from others based on their experience and expertise. The hotel workforce needs to share existing reports and official documents with members of my organization, to collect reports and official documents from others in their work, to have knowledge sharing mechanisms, to have a variety of training and development programs and to have skills in IT systems for knowledge sharing. To facilitate strategies based on explicit knowledge, hotel managers should establish the organizational structures and processes needed to stimulate the exchange of codified and work-related knowledge. As tacit knowledge is more difficult to control, these decision makers should activate strategies aimed at tacit knowledge management, namely consider the creation of work-based teams, rewarding workers based on collective performance and organizing activities with the goal of team building.

Hotel industry managers should potentiate the synergies of tacit/explicit oriented and internal/external oriented knowledge management strategies, and these should be aligned to improve the performance of the company.

Despite all the virtuosities of our study, limitations are inevitable. The methodological design with cross-sectional data collection cannot be used to uncover potential causalities between source and type-oriented knowledge management strategies, so a methodology based on longitudinal data collection

Table 2. Linear regressions (estimated coefficients)

	Model 1		Model 2		Model 3		Model 4		Model 5	
	OP	**FP**	**OP**	**FP**	**OP**	**FP**	**OP**	**FP**	**OP**	**FP**
Hotel age	0.02*	0.01					0.00	-0.01	0.01*	0.02*
Integrated in a group	-0.06	0.20					-0.06	0.06	0.13	0.40
Algarve	-0.06	-0.54					0.08	0.36	0.05	-0.04
Lisboa	-0.39	-0.35					0.22	0.37	-0.02	0.24
Category (stars	0.15	0.10					0.04	-0.09	0.17	0.15
International market (%	0.01	0.01					0.00	0.00	0.00	
Internal			0.54*	0.64*			0.90*	1.92*		
External			0.29*	0.11			0.26*	0.36*		
Tacit					0.20	0.39*	0.41*	0.37*		
Explicit					0.29*	0.05	0.12	1.16*		
Internal x Tacit									-0.46	-0.01
Internal x Explicit									0.38	1.58*
External x Tacit									0.52	1.38*
External x Explicit									-0.36	1.77*
R^2	17.5%	8.4%	71.6%	38.2%	22.4%	9.7%	66.5%	61.2%	66.5%	61.2%
Adjusted R^2	7.2%	3.0%	70.5%	35.9%	19.0%	5.6%	57.4%	50.7%	57.4%	50.7%

Note: * $p < 0.05$; OP – Operational Performance; FP – Financial Performance

should be employed in future research. Second, the data used in this study, particularly those of operational and financial performance, were collected from the perceptions of hotel managers, which may lead to some bias in the results, and future research may collect objective indicators for performance from the company. Finally, our research refers to a specific sample of a country (Portugal), and may limit our conclusions, implying future research to test our research model in different countries or sectors to improve the generalization of our results.

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APPENDIX

Measurement Items

External-Oriented Knowledge Management

1. Our company collaborates with external institutions or organizations in R&D
2. Our company tends to solve problem with the help of external experts
3. Our company prefers acquiring new knowledge from outside media such as internet
4. Our company emphasizes gaining new knowledge from customers and alliance

Internal-Oriented Knowledge Management

1. Our company prefers internal knowledge in R&D
2. Our company trusts internal knowledge when faced with troubles
3. Our company encourages employees to bring forwards work-related suggestions
4. Our company cultivates professionals from inside

Tacit-Oriented Knowledge Management

1. Employees in my organization frequently share knowledge based on their experience.
2. Employees in my organization frequently collect knowledge from others based on their experience.
3. Employees in my organization frequently share knowledge of know-where or know-whom with others.
4. Employees in my organization frequently collect knowledge of know-where or know-whom with others.
5. Employees in my organization frequently share knowledge based on their expertise.
6. Employees in my organization frequently collect knowledge from others based on their expertise.
7. Employees in my organization will share lessons from past failures when they feel that it is necessary.

Explicit-Oriented Knowledge Management

1. Employees in my organization frequently share existing reports and official documents with members of my organization.
2. Employees in my organization frequently share reports and official documents that they prepare by themselves with members of my organization.
3. Employees in my organization frequently collect reports and official documents from others in their work.
4. Employees in my organization are frequently encouraged by knowledge sharing mechanisms.
5. Employees in my organization are frequently offered a variety of training and development programs.
6. Employees in my organization are facilitated by IT systems invested for knowledge sharing.

Operational Performance

1. Customer satisfaction of our company is better than that of key competitors
2. Quality development of our company is better than that of key competitors
3. Cost management of our company is better than that of key competitors
4. Responsiveness of our company is better than that of key competitors
5. Productivity of our company is better than that of key competitors.

Financial Performance

1. Return on investment of our company is better than that of key competitors
2. Return on assets of our company is better than that of key competitors
3. Return on sales of our company is better than that of key competitors
4. Average profitability of our company is better than that of key competitors
5. Profit growth of our company is better than that of key competitors
6. Sales growth of our company is better than that of key competitors.

Chapter 3
What Are the Challenges of Cyber-Physical Models in the Tourism Business?

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ABSTRACT

In the information age, factors such as globalization and new technologies have influenced consumers' choices. Many companies are connecting with them in a creative way. Customers contribute with ideas, not only for products but also for services and systems. Cyber-physical and mobile media tend to revolutionize the business model across multiple industries. This chapter reflects on how Portugal is in terms of digital transformation, through the internet of things (IoT) and smart applications. Also, which impacts can these trends have in tourism, facing the fourth industry challenge whose cyber-physical processes perform new services. Portuguese firms increasingly focus on services and knowledge. Customer data has been a factor of knowledge expansion and its materialization into new goods and services. However, this overwhelming potential requires more flexible processes and digital skills in companies. Recent innovation acceleration programs are helping them to cope with these trends, due to their entrepreneurial orientation and external knowledge connections.

INTRODUCTION

The new trends in industry ('fourth Industry') introduce what has been called the smart platforms, in which cyber-physical systems monitor the physical processes of a business and make decentralized decisions. These systems include IoT and communications, either between machines or through machine-human interactions, in real time via wireless web. Given the speed of technological change and its impacts in business model's change, these issues should be addressed. The present research aims to discuss these trends, challenges and potential to Portuguese firms, emphasizing the tourism sector for its importance to the country and to the economy in general. Also, it is a very interesting and appropriate sector for experiences on cyber-physical systems and platforms because of its adherence to mobile-online-personal

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interactions for smart tourist-destination services (Babu and Subramoniam, 2016; Bismart, 2017). More and more tourism and travel brands tend to develop ‘experience platforms’ in order to support travel experiences that enable travelers to know and share the culture, heritage and people of the local communities they visited or want to visit.

A factor behind this digital transformation is related with social media platforms and company websites that have encouraged user-generated contents and services (Yadav, Kamboj and Rahman, 2016; Sigala and Chalkiti, 2014). Today’s consumer has become an active participant in the creation processes of companies (co-creation), whether it is a product or service development or the promotion of products/services. These cases are evidences of a paradigm shift in control from companies to consumers. This elucidates the role of digital transformation in front-end innovations and customer relationship management (Sarkar, 2014).

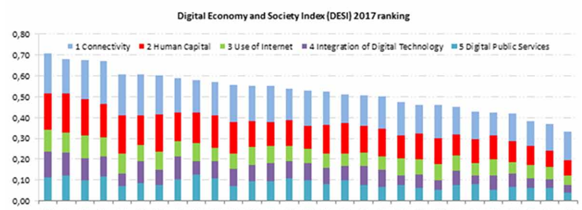
In order to pursue the objectives referred, this research is structured as follows: next section presents a literature review on the subject in general and on assessing its potential for Portuguese firms; third section discusses the shift from digital to smart tourism and its main developments and impacts (some cases are visited); fourth section presents the contribution of innovation accelerators to support and monitor that shift, referring a Portuguese case - the accelerator of startups ‘Beta-i’; fifth section reminds the need of context awareness in cyber-physical platforms for more effective real-time responses; and last section, conclusion, highlights the contributions of this work for the field, its limitations and future research.

LITERATURE REVIEW

Technological trends such as cloud computing, mobility, big data and increased processing capacity are driving the IoT wave. This is creating an unprecedented opportunity to connect what was still disconnected among people, processes, information and things (RES, 2013). This scalability has allowed cyber-physical systems and platforms that support the business or logistics’ models of the fourth industry (i4.0). Its scope is oriented towards the intelligent implementation of networks connecting equipment with equipment and people with equipment. This is not restricted to the simple automation or electronic control of processes and management, as it can include digital solutions to meet the needs of increasing product and service customization. In the particular case of tourism, the investments oriented to the digital transformation encompass the following main technologies:

1. Products and services integrated with emotional intelligence;
2. Products and services inclusive and accessible to all, including those that use wearable systems to communicate/interact with the tourist;
3. Integration of products and services with virtual or augmented reality, in communication and marketing;
4. Applications/games with 3D scenarios, combining products/services with virtual reality, photography, video, sound and text, promoting an immersive tourist experience;
5. Engagement applications with tourists allowing access, customization and segmentation of services;
6. Business intelligence (BI) solutions for real-time analysis of Big data;
7. IoT for connection between physical systems and online platforms;
8. Cloud computing for data storage.

Figure 1. Digital economy and society index (DESI) 2017 ranking
Source: DESI 2017



With powerful tools of data processing and analysis, this information allows optimizing the value chain and identifying existing flaws and knowledge about consumers' habits and preferences. Google's data show that 36% of consumers are willing to pay more for personalized experiences (PhocusWire, 2017). In this context, integrated monitoring systems gain relevance and in addition, the projects related to the collaborative economy, i.e., new knowledge sharing platforms. This represents product innovation through connected or intelligent services, leading to faster product development (less time-to-market), greater customization, and support of information flows between the market and production. This can result in increased productivity and logistical flexibility through the use of autonomous, modular and connected systems.

Portugal in the Digital Wave

Countries such as Denmark, Finland, Sweden and Netherlands have the most advanced digital economies in the EU, followed by Luxembourg, Belgium, UK and Ireland. Romania, Bulgaria, Greece and Italy have the lowest scores on the DESI - Digital Economy and Society Index (Figure 1).

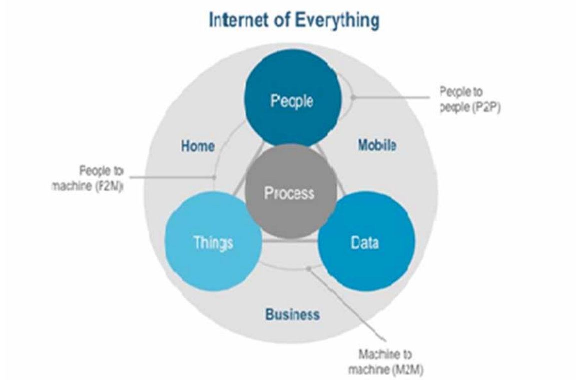
In 2016, all member States improved on this index. But a low increase occurred in Portugal, Latvia and Germany (below 0.02). Portugal ranks 15th in DESI 2017 and improved its score in all DESI dimensions, except for digital public services. Greater progress took place in fixed and mobile broadband take-up (connectivity) as well as in the corporate use of digital technologies.

Portugal's greatest challenge lies in raising the digital skills' level of its population. According to data from the National Institute of Statistics (INE) in Portugal, 70% of companies have online presence, either with a simple webpage or with a well-defined global digital strategy. In this context, "companies are looking for more experts in this area", said Sofia Montalvo - head of Digital Marketing and e-Commerce at Michael Page[1] (Freire, 2017).

In terms of technical aspects, professionals familiar with web technologies (26%), knowledge about new digital media (23%), and domain of HTML and HTML5 languages (20%) were ranked. Companies in the most varied areas will need more digital skills. Professionals of the digital age are global professionals as new forms of work (such as remote, BYOD - bring your own device, and co-working) require increasing flexibility and collaboration.

The 'Digital Single Market' for Europe is a major priority of the European Commission. It is built on three main pillars: (1) better access for consumers and businesses to digital goods and services across Europe; (2) creating the right conditions and a playing field for digital networks and innovative services to flourish; and (3) maximizing the growth potential of the digital economy.

Figure 2. Key potentials of IoT
Source: RES (2013)



Online platforms play an increasingly central role in social and economic life and are an important part of a thriving internet-enabled economy. The wider EU policy interest is to spot business opportunities for launching services based on the internet and key enabling technologies. Websites or platforms offering dynamic features to visitors are an important part of the digital wave that businesses use to increase their cyber-presence, improve advertising opportunities, communicate and interact with partners, customers and other organizations. Processes are changing, what implies a change in the business model. Cyber-physical systems and IoT are gaining space through augmenting customization, scalability and real-time response. What can this integration do in several areas such as banking, tourism or health care? As tourism is one of the most important sectors for the Portuguese economy, we further discuss these digital trends in tourism.

From Digital to Smart Tourism

In today's digital landscape, most departments have to automate tasks such as emails, social media, and other actions. But IoT has the potential to transform the business model. In tourism, it can transform the entire travel experience. Many hospitality companies are investing heavily in this technology, keeping the customer at the forefront. Figure 2 illustrates the unstoppable growth of IoT, bringing the confluence between people, processes, information and things.

In this context, integrated manufacturing monitoring systems gain relevance and in addition, the projects related to the collaborative economy, i.e., new knowledge sharing platforms. This represents product innovation through connected or intelligent services, leading to faster product development (less time-to-market), greater customization, and support of information flows between the market and production. This can result in increased productivity and logistical flexibility through the use of autonomous, modular and connected systems.

The first area of tourism revolved is marketing: selling tourism products and services online is an inspiration for travelers in the world. Today, digital marketing, search engine optimization, mobile and location-based apps reach the potential traveler within seconds (Prajapati, 2014). The second area is the organizational infrastructure, which influences the response readiness to customer requirements. Table 1 describes some examples of IoT potential for tourism business:

Table 1. IoT potentials for tourism business

Tourist tracking system	coordinate transport as per the number of tourists
Personalization	suggestions based on tourist preferences
Less of the beaten path	explore more of what one likes
Deterring crime	cameras and video analytics
Real time updates	nearby points of interest, accommodation, eating options, weather, currency rates
Augmented reality	overlaying icons to explain precisely what a tourist is looking for
Targeted information	broadcast of useful information to smartphones through beacons

Source: Adapted from KSTDC (2017)

These technologies create a smart tourism setting that supplies relevant information to consumers, better decision support, greater mobility, and enjoyable experiences (Gretzel, 2011; Sigala and Chalkiti, 2014). They can include a wide range of technologies such as decision support systems and the more recent context-aware systems, autonomous agents searching and mining web sources, ambient intelligence and augmented reality (Lamsfus, Wang, Alzua-Sorzabal and Xiang, 2015). In smart tourism, technology is seen as an infrastructure rather than individual information systems. Because it encompasses a variety of smart devices that integrate hardware, software and apps in order to provide real-time awareness of the physical world. It also provides feedback and advanced analytics to help people make more intelligent decisions about alternatives, as well as actions that will optimize business processes (Washburn, Sindhu, Balaouras, Dines, Hayes and Nelson, 2010).

Two main impacts of this shift are: 1) providing tools to respond more accurately to the context within and around users; and 2) enabling customers to become co-creators or co-innovators. Regarding 1), for example the SoCoMo (Social Context Mobile) conceptual model is a new framework that enables marketers to increase value for all stakeholders through mobile marketing (Buhalis and Foerste, 2015). Regarding 2), customers now have enterprise-grade hardware in their pockets and their voice is amplified across the globe by social channels accessible by everyone. Customers provide insight into hidden problems, market opportunities, organic promotion and innovation at scale. Thus, companies cannot ignore the innovators within their customer communities.

This means a significant shift involving changes to business model, organizational structure, information systems and culture (Menzies, 2016). Building a relationship with those innovative customers is critical for the co-creation process to fully grow. Once this relationship is built, they can be used as early product testers and then promoters. Customers become regarded as co-producers of a service and value co-creators. When firms have digital platforms for customers to participate in value co-creation, this produces stronger path-dependent behavior that firmly connects them with the firms. For example, tourists' involvement in the process of co-creating their trip increases their satisfaction, so they can treasure the whole tourist experience (Shaw, Bailey and Williams, 2011).

Some Cases Visited

Mobile keys

For instance, mobile keys were already introduced by some hoteliers. Guests no longer need to wait in line at the front desk; through a mobile app guests are notified when their room is ready. Once at the room, guests simply wave their phone in front of the lock to open the door. Mobile keys increase guest satisfaction and then the probability of booking a room through the hotel's app or website. Each guest can be monitored by room identity, allowing hotels to collect data about their preferences in order to offer them a more customized experience in their next stay (Lubetkin, 2016).

IoT also makes it possible to perform preventive maintenance remotely. Malfunctioning equipment can be detected and analyzed long before it becomes a major issue. Thus, IoT is the infrastructure that connects physical and real objects to the cyberspace (internet). This can have an enormous potential in the tourism industry.

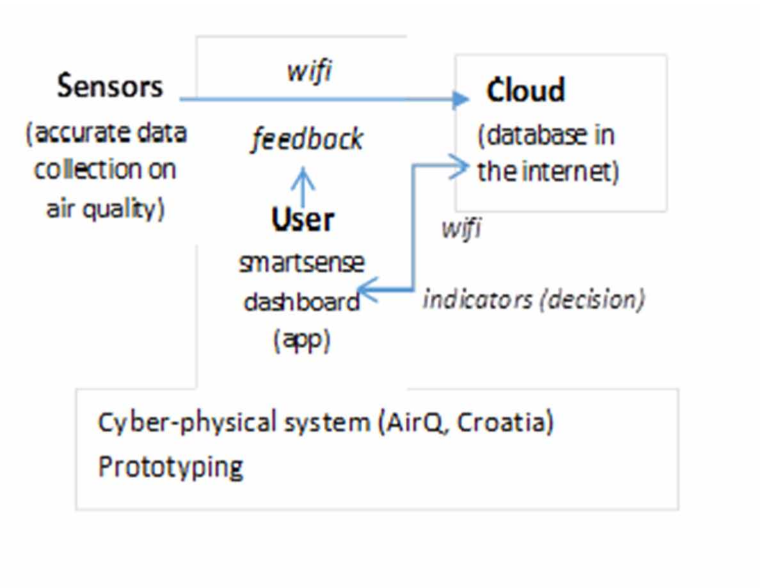
The overwhelming potential of cloud storage with wireless internet requires a flexible approach on process architecture in companies. The main goal is to manage the adherence to new business models supported by mobile, big-data or IoT technologies. This is important as future European investment funds base on developing and matching these strengths to market needs (European Commission, 2016). A network of smart devices can be set up to enhance the working of any business and its services. In tourism, there can be a better assistance to tourists through mobile apps such as manage the experience of touring a place by the smart coordination of the objects at that place. This enhances the overall experience of the tourist (regarding the shortest route to reach, traffic congestion in that route, alternate ways to reach the place; etc.).

Smart City Tourism

City tourism is driven in part by large events, such as concerts, sporting events, fashion shows, etc. Intelligent crowd management is a great way that smart tourism capitalizes on IoT to streamline services provided. The same technologies can be used to help move people where they need to be, plan services based on their behavior, and even target advertisements from businesses to where crowds will be at a predictable point in time (Bismart, 2017). Smart city tourism IoT technology can provide event managers with valuable data about where people are located, how they are moving, and how they are arriving at or leaving the event site. An example of smart city tourism technology for crowd management is telecom company Orange in Antwerp (Belgium). It can provide a real-time stream of all smartphones connected to its network within a given area. A crowd-monitoring dashboard displays the data. This lets the city government to monitor where people are, anonymously. This technology can be used during large city events, in order to provide visitors with an enjoyable experience.

The city of Weimar in Germany is another example of smart city tourism through the combined use of IoT and augmented reality. Using a map app, tourists can find important landmarks and when they point their camera at the landmark, while looking at the screen they can view historical photographs superimposed onto the current scene (Bismart, 2017). The technology also allows tourists and students to understand inscriptions, through translation and enhanced visual analysis, allowing a greater understanding of certain historical monuments or events. Traveling will become easier and more enjoyable through the IoT and smart city tourism investments.

Figure 3. A cyber-physical system and its impact in tourism



The AirQ System

The use of mobile Internet and travel mobile apps enhances the tourist-tourist relationship and, in turn, increases social capital through reciprocity and cooperation (Kim and Kim, 2017). Real-time communication enables transactors to share value and increase cultural capital. Figure 3 shows a case of a cyber-physical system named AirQ, developed by SmartSense in Croatia. This system, from tourists' feedback in real time using the related mobile app, can collect relevant information about the air quality. Then, a data analysis of the associated cloud database can quickly delineate either preventive or corrective actions. Based on the resulting indicators, several issues such as pollution charges can be invoked.

Characteristics/components of this cyber-physical system:

- **Sensors:** for IoT deployment (firmware, software)
- **Coverage:** Open new locations, through existing LTE networks (high-speed wireless)
- **Real-Time Data:** Dashboard (quick relay of measurements from the sensors)

The presence of sensors in the machines and products allow collecting important data. Accurate and reliable data collection from those sensors is important to ensure that up-to-date information is available to the users of the SmartSense dashboard. Automatic decision and actions can be triggered, depending on the data received. SmartSense have partnered with Deutsche Telekom, T-Systems, Hrvatski Telekom, local Greek operator Cosmote and Hub: Raum. This last is the early stage incubator of Deutsche Telekom, which through participating in their NB-IoT prototyping program, developed this partnership (GSMA, 2016a). NB-IoT (Narrowband IoT) is a low power wide area network radio technology standard developed by 3GPP to enable a wide range of cellular devices and services. NB-IoT focuses specifically on indoor coverage, low cost, long battery life, and high connection density.

The AirQ sensor, with the right power and coverage, is able to be positioned in locations previously inaccessible. New sensors can be developed as a result, meaning that additional areas such as indoors can be monitored. The sensors are also able to continue monitoring the full range of pollutants and sensors deployed to collect additional information such as weather conditions, which affect air quality day to day. NB-IoT offers enough bandwidth to transmit all collected data as needed. Thus, the AirQ sensors can be installed in many more locations, whilst still maintaining the same quality of service. This means that data collected is more accurate and any locations suffering from high pollution can be more thoroughly monitored. NB-IoT offers a flexible, proofed solution for monitoring air quality at multiple sites throughout a city. This means that the customer experience is improved, and the costs of maintenance and installation are reduced, creating a strong proposition for the city wishing to improve its air quality. In result, a number of new use cases and business opportunities can arise with the data obtained from this cyber-physical system. The data will not only be used to generate direct revenue for exceeding air quality levels, but also indirectly when automatic decisions and actions can be triggered. For example, traffic management systems can be controlled to ease pollution for a better user experience and congestion, or pollution charges could be invoked using various smart solutions.

Based on this kind of processes, several other cases and projects can be developed, with impacts in tourism business. For example, mobile operators are now particularly well placed to provide tools that can be used for crowd management. Tracking the location of mobile phones and analyzing data collected by mobile-enabled IoT sensors provide a highly accurate way to monitor and manage crowds across all sorts of gatherings, whether they are in city centers or in remote locations (GSMA, 2016b).

Methodology – Assessing the Contribution of Innovation Accelerators

A question that emerges from previous assessment is: How can Portuguese firms (mainly small and medium-sized) address these challenges? Several recent innovation accelerators' programs have helped them to cope with these trends, due to their entrepreneurial dynamics. For instance, knowledge sharing is an important characteristic of these environments (Chesbrough, Vanhaverbeke and West, 2006). Firms that are internally centered need to open their boundaries to external partners, otherwise numerous opportunities are missed (Laursen and Salter, 2006). Several studies support that firm's boundary requires porosity in order to absorb knowledge and capabilities from the environment. This can provide an extensive variety of novel ideas and innovation opportunities and access to complementary resources that turn an innovation into a market success.

An innovation accelerator is an intensive business program (usually 3 months) which includes mentorship, educational components, networking and aims at growing business rapidly. Thus, it is an open and interdisciplinary environment. Usually the entrepreneur moves into a shared space with other new founders to work under the tutelage of advisors and experts. In exchange for the expert mentoring, exposure to investors and investment from the accelerator, the entrepreneur agrees to give a portion of his company's equity to the partners of the program. For this reason, it is often called a 'seed' or 'venture' accelerator. An accelerator program consists of five main elements (Christiansen, 2009): 1) funding, typically to the seed level; 2) company founders, small teams with technical backgrounds; 3) each group supported for a defined period of time; 4) education program, focusing on business and/or product advice; and 5) networking program, to meet other investors and advisors. Accelerator programs may include office space (free or subsidized) and a demo-day for funded companies.

The program's model comprises five features which set it apart from other approaches to business incubation (Miller and Bound, 2011): 1) an application process, open to all yet highly competitive; 2) provision of pre-seed investment, usually in exchange for equity; 3) a focus on small teams, not individual founders; 4) time-limited support, comprising programed events and intensive mentoring; and 5) groups or 'classes' of startups rather than individual companies. While traditional business incubators are often government-funded, generally take no equity and focus on biotech/medical/ technology or product-centric companies, the accelerators can be either privately or publicly funded and focus on a wide range of industries.

One of the best startup accelerators in the world is Techstars in Boston - USA (http://www.techstars.com/). Fewer than 1% of the companies that apply to it are accepted. One of the few Portuguese startups accepted was DoDOC. This company, established in February 2014 by three students of the MIT doctoral program, was chosen from among 1500 candidates around the world. DoDOC was one of the 10 finalists of Lisbon Challenge and is a great example of growth of the Portuguese entrepreneurship ecosystem during the last years.

The Case of Beta-i and New Challenges

In Portugal some successful innovation accelerators are *Fábrica de startups* and *Beta-i*. Analyzing some statistics about accelerators' activity in Portugal, Table 2 shows the case of *Beta-i* in terms of number of accelerated startups (from 2013 to 2015) and percentage of still active ones.

An interview was made to an innovation manager of Beta-i, and some of the data obtained are in Table 2. We can acknowledge that one of the sectors having more new firms is tourism, followed by marketing & advertising, and entertainment & leisure. We tried to contact other accelerators, but without any answer to the emails sent. Tourism is one of the fast-growing sectors online (Babu and Subramoniam, 2016). User-generated data such as Social Media Data (SM), Floating Card Data (FC), Mobile Phone Data and Smart Card Data (SC) have potential to help organizations understand mobility preferences, transport selection, departure and arrival times, frequency and scope of undertaken trips and many more (Gkiotsalitis and Stathopoulos, 2016). With the advent of information-communication technology, tourism has transformed itself from organized team style mass tourism mode to personalized style.

The 'Startup Portugal' program (National Strategy for Entrepreneurship) will have new measures to promote entrepreneurship, including the opening of an innovation center in tourism. In all, there are 19 measures which target sectors such as Tourism, Commerce and Restoration, and the introduction of new ones in programs that already exist: *Startup Voucher*, *Momentum program* and *Incubation Valley*. The Startup Voucher supports the development of projects in the idea phase. The Momentum program is oriented for recent graduates of higher education who have benefited from social action scholarships and in the end intend to develop a business idea. The Incubation Valley supports companies under one year in the area of entrepreneurship.

Among the new measures to support entrepreneurship is the opening of a Tourism Innovation Center with a digital academy and a specialized incubator. Its mission is to promote innovation in the tourism sector, supporting the development of new business ideas, development and experimentation of projects, and training of companies in the field of innovation and digital economy. In this center it will be created the Digital Tourism Academy, a business training program for digital transformation and an incubator of companies specialized in the development of innovative solutions for tourism. In addition, the Startup Center will be created and a digital mapping platform for startups and national incubators,

Table 2. Beta-i accelerator results by sector/market

Sector/market	Nº
Agriculture & Farm	2
Analytics	3
Biotechnology	3
Business & Productivity	23
Construction	1
Creative Industries	5
Education	13
Electronics	5
Energy & Clean tech	4
Entertainment & Leisure	14
Fashion	1
Finance	11
Food, Beverages & Tobacco	4
Health & Healthcare	9
Marketing & Advertising	16
Pets	2
Real Estate	3
Retail & Distribution	9
Sports	7
Telecommunication	4
Tourism	19
Transportation	2
Total	160
percentage of still active startups: <68%	

Source: Data from an interview to Isabel Salgueiro, innovation manager at Beta-i

which includes centralized information on all types of support available to the ecosystem, as well as the pitch voucher with a password. This last is intended to allow startups to have the opportunity to develop businesses or relationships with companies so that they can have financing and new customers, as well as for mentoring purposes.

Other measures are: training courses for entrepreneurs and collaborators of startups (90% reimbursed through funds) to bring startups closer to the public sector through the InovGov measure (innovative solutions for the public sector); the ‘open kitchen labs’ which supports the testing of new products, services or concepts in the area of catering; and hackathons to accelerate digital transformation in the commerce and tourism sectors. A tax incentive - KEEP (Key Employee Engagement Program) - is foreseen for technology-based companies under the age of six that can compete with other companies in recruiting and retaining highly qualified staff. Through this initiative, startups will be able to pay their employees with shares in the company’s capital. International co-investment funds; co-investment instruments with incubators and accelerators; capital and acceleration; and financing lines of technological development for tourism (support for digitization and call for projects in the sector) are other measures.

The list of new initiatives also includes the MVP - Minimum Viable Products - to allow access to venture capital investment. Thus, the entire program is one of the Government's priorities to foster economic competitiveness, job creation and investment attraction. The projects around IoT and fourth industry can turn more successful if they are well designed and planned. For that it is important the process architecture approach, especially the next architecture generation. This really makes a difference, augmenting the flexibility and context awareness of the resulting systems. So, they tend to match and mix with the reality what is very interesting and attractive for users and enterprises in several areas.

Context Awareness Match

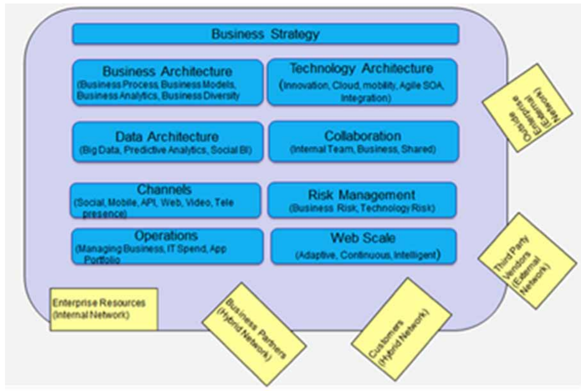
Advanced systems require models to represent the reality on evaluation, like a structured architecture, to quickly explore the solution (Ambler et al., 2005). Ontologies can help as they represent a set of concepts within a domain and the relationships between them, in order to make inference on the objects of that domain. They are used in artificial intelligence, web semantics, software engineering and information architecture as forms of representing knowledge about events.

Given the speed of technological change on business model and processes, these should be increasingly addressed through the process architecture approach (Spewak and Hill, 1992). This consists of defining and understanding the different elements that shape a project/system and how those elements inter-related inside and outside it (Sousa et al., 2006). Cyber-physical tools increasingly need data and process flows' modeling for better discerning and acting at its selection and alignment with business objectives.

In every model, there is an explicit transition from business to technology and from goals/ requirements to applications. However, this transition can be less explicit due to abstract business process requirements and methods dictated by emergent technologies. User interface design and mobile connectivity are showing that this boundary - between model and development - is softening to a zone rather than a line, and greater flexibility within that zone is essential for diverse outcomes (Nolle, 2016). According to Palli and Behara (2014), without an open architecture there will be gaps and conflicts such as: lack of consistency due to the absence of standards; dissipation of critical information and knowledge of the deployed solutions; redundancy and lack of flexibility in the deployed solutions; non-adoption of next generation technologies; lack of integration and interoperability between applications; fragile and costly interfaces between incongruent applications.

Traditional architecture is more tool-driven as most of its function is technology-centric and defined as a one-time initiative. Next generation architecture (NGA) is more business-centric - global, agile, continuous and social digital networked. Many organizations have adopted latest digital capabilities such as social web, service-oriented architecture, big-data analytics, cloud computing, virtualization, IoT, etc. Today, these technologies require to be interrelated and fit together (Palli and Behara, 2014) – Figure 4. Thus, business model is shifting to digital architecture, addressing networked community capabilities (interaction with users and other agents through social media), globalization (borderless systems), product/service innovation (open and virtual innovation), collaboration (employees in decision-making, mobile work), and flexibility (to choose technologies, infrastructure, applications).

Figure 4. **N***ext generation architecture model*

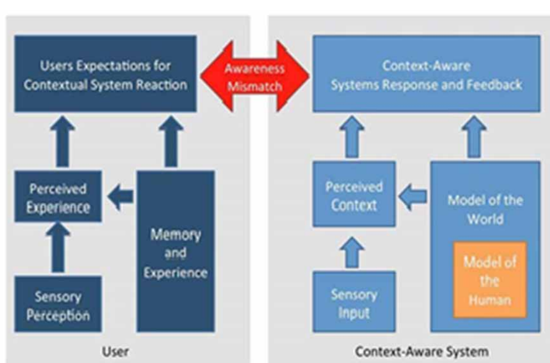


Process architecture results should integrate with business planning and business model architecture, defining business-outcome metrics. Also, NGA program definition should not span for years, as it should deliver business value in months or weeks. On another hand, Figure 5 illustrates the importance of NGA for an awareness match: user's perception and user's experience leading user's expectations, which the enterprise and its systems (if context-aware) capture from sensory inputs (Schmidt, 2013).

In current cyber-physical systems, a variety of sensors are used to acquire contextual information. Examples of sensors used are: GPS (for location, speed), light and vision (to detect objects, activities), microphones (for data about noise, talking), gyroscopes (for movement, orientation), magnetic sensors (to determine orientation), touch sensing (to detect user interaction), temperature sensors (to assess the environment), etc. Other sensors serve to detect the physiological context of the user, such as galvanic skin response. This can be used to determine skin reactions (e.g. surprise or fear for lie detection). All these types of sensors can be used to feed the enterprise systems with context information. The quality of this information may be improved by using a set of sensors rather than one, resulting in advanced user interfaces. In tourism, this is relevant to enhance tourists' experiences and interactions.

To match sensory information with the context, the perception tasks are done by means of machine learning and data mining. This contributes to increase the system's understanding and interaction with

Figure 5. Context awareness covered



its surrounding environment. This enables the design of better user interfaces that challenge business models to become more flexible, accurate and agile. The technological variety referred until now can perform systems that can act differently in different contexts. If well designed, they can match the users' expectations in their contexts.

CONCLUSION

In Portugal, the companies (mostly small and medium-sized) invest little in R&D (research and development) due to their limited financial and organizational capacity and skills. A recent CIS (Community Innovation Survey) reveals that main innovative sectors in the Portuguese economy are: research-based (computer, civil engineering, R&D); knowledge-based (insurance, health); and service-based (retail, tourism). Private customers are important sources for all of them, what means that Portuguese firms generally use customers' information and relations for innovation purposes. These results are in line with the fact that Portuguese economy is mainly based on small and medium-sized firms (SME) that increasingly focus on services and knowledge. Customers' data allow expand the knowledge-base within their applied research, and materialize this knowledge into goods and services (Sánchez-González and Herrera, 2014).

A major challenge is discerning patterns of relationship and impacts on business model and processes when putting machines in interaction with each other and then with users. This overwhelming potential (cyber-physical) requires more flexible process architectures and digital skills in companies. The main goal is to manage the adherence to new business models supported by mobile, cloud, big-data or IoT tools. Mobile connectivity, machine learning and context awareness match imply that the boundary between the enterprise and its surrounding is softening. Greater flexibility is essential to get more innovative and differentiating products/services (Nolle, 2016). This is very relevant for tourism as it is a highly productive sector in the economy.

Innovation accelerators, such as Beta-i and 'Startup Portugal' program in general, have been helping firms to cope with these challenges. These programs have resources that encourage and support new entrepreneurial initiatives and business models. It is curious that a major number of new innovative firms (startups launched) in Beta-i belong to tourism sector. So, tourism can really be an industrial 'lab' to explore and apply these trends and challenges. Recent discussions in the EU, about bridging the physical and digital dimensions for smart tourism and smart cities, have alluded to these issues (European Commission, 2016). Future research intends to follow up these discussions and related projects, in order to build a portfolio of cases to compare them and discern driving forces through a more advanced analysis (clustering or other). Some of the limitations of this study should be then overcome, such as using more cases and relate them to tourism sustainability indexes and best practices.

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ENDNOTE

1 A world leading expert recruitment consultant.

Chapter 4
La Barranca del Rio Santiago as Tourist and Eco-Touristic Attraction for the Brand Guadalajara Guadalajara:
Focused on National Tourism

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ABSTRACT

The main purpose of this chapter is to show if the Barranca del Rio Santiago is a tourist attraction and ecotourism so it could be included in the Guadalajara brand, which is focused on national tourism. The research is exploratory and descriptive in nature. Only the national indicators of the Metropolitan Area of Guadalajara were taken in reference to motivation, what they like most, means by which they arrive at the destination, etc. SECTUR establishes in the latest competitiveness agenda of tourist destinations in Mexico that Guadalajara has a large number of natural destinations, including the Barranca del Río Santiago. This destination has a high ecological, recreational, and landscaping value, largely unknown by the local population, and consequently it can become a new product for the ecotourism sector.

INTRODUCTION

In the following investigation, it is analyzed if the Barranca del Río Santiago can be a tourist and eco touristic attraction for the city of Guadalajara, focused on a national tourism. That is why it is talked about the term's tourism, alternative tourism, national tourism, ecotourism, which is a tourist attraction, the city or city marketing brand, the Guadalajara brand and the Barranca del Río Santiago. All these

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terms are based on several expert authors on the subject and official documents which are provided by the Secretary of Tourism of the State of Jalisco.

Undoubtedly, city brands are something that has been raised for a long time and there are success stories, very famous, such as I Love NY or what is the CDMX brand (Aldaz, 2016). Another important aspect of the research is that the Guadalajara brand was launched by the government of Guadalajara in 2016 with the characteristic song of the composer Pepe Guízar (Social communication, events, government news 2016).

Regarding tourism issues, it is commented that tourism is an economic force, which has the power to implement projects that maintain the natural attractiveness that visitors wish to see and experience. The economic benefits of tourism depend on the way in which tourist attractions are kept safe, clean and pleasant to the senses (Rebollo, 2012, p.12). Alternative tourism refers to there are other ways of doing things. For example, traveling and knowing places, more natural. (Rogel, Rojas & Ortega, 2011, p.3).

However, it is necessary to define perfectly what fraction of tourists are going to be taken from national tourism, which is practiced by nationals and foreigners residing in the country within its borders, that is, tourists traveling inland. of the country they do it for vacation reasons, recreation, congresses and conventions, work and business (Portugal, 2008). Then, it can have segmented it more and reach the ecotourism sector, which is considered the direct result of global acceptance in favor of more sustainable productive practices and with less impact on the environment.

THE RESEARCH PROBLEM

The city marketing is an event that has generated debates, because on the one hand it is noted that the commercialization of territories has existed for centuries, and on the other hand, it is maintained that it is a trend that arises from the seventies and eighties (Weapons, 2007). However, we have other authors who comment that “The marketing of city (city marketing) can be defined as an active policy of actions aimed, on the one hand, to identify and determine the needs of its different audiences, real and potential; and another part to develop a series of products and services in the city to meet those needs, creating and enhancing their demand (Rojano & Castilla, 2007).

There are success stories of the brands of cities, for example, I love NY” (Marín, 2010). In Mexico there is currently the brand Visit Mexico (CPTM, 2017), however, Guadalajara wanted to make its own city brand which carries the Guadalajara slogan created in 2016 as an identity element, tool for promotion and positioning of the city de Guadalajara (Social communication, events, government, news, 2016). The creators of the brand were based on the song of Pepe Guízar, since it represents a natural symbol of the city and reinforces emotions and ideas already positioned, with the characteristic choir Guadalajara, Guadalajara. In the same way, the adaptation of the song of the aforementioned composer, in which different styles of music such as mariachi, rock, electronic, jazz and regional music was mixed, also mixed a variety of singers with the intention to integrate all of Mexico (Catellanos, 2015).

An important factor is the intervention of the tourism sector. Troisi defines tourism as the set of temporary transfers of people originated by needs of rest, cure, spiritual or intellectual (Betancourt, 2008). An important factor is to take into account the national tourism which is defined as the tourists that move in the interior of the country do it for vacation reasons, recreation, congresses and conventions, work and/or business, etc. (Portugal, 2008).

It is also important to point out that, according to Ipsos, the advertising tracking of the preliminary tourism promotion council, taking into account 3 indicators which mention that in 2017, 46% of people visit a place are by advertising attribution; 90% are people who intend to travel and the third indicator by brand awareness which nationally does not have any percentage. Similarly, a national survey on Pride of the Mexican in 2016 conducted by the consultancy Mitofsky mentions that 9.9% of the 1,000 respondents over 18 years old answered that Guadalajara was the first city where Mexicans felt most proud (Mitofsky Consultant, 2016).

According to experts who elaborated the competitive agenda of tourist destinations in Mexico, they pointed out that Mexico has not been able to take advantage of the total benefits offered by tourism, a clear example of this is the city of Guadalajara, which is one of the most emblematic states in Mexico. This city is highlighted by its great cultural contribution, tradition and historic buildings, however, it has not been able to take advantage of the natural heritage it has to give it recreational or tourist use, since it has great potential in this sector as it is the Canyon of the Santiago River (SECTUR, 2014).

After all these data provided a gap is created which becomes the purpose of the research that consists of knowing how attractive ecotourism can be so that it can be added to the Guadalajara brand and what the potential areas may be. With the intention of contributing this study to the corresponding authorities in the tourism sector and for the expansion of the labor market in a way that will enable them to carry out ecotourism activities. Taking into account that the definition of tourist attraction, the dictionary of tourist terminology of the Argentine National Tourism Direction mentions that a tourist attraction is the natural, cultural, sports or any other type that can generate enough interest to attract tourists (Navarro, 2015).

In this research, it is asked if the Barranca del Río Santiago is a tourist and eco touristic attraction for the Guadalajara city brand, in order to be able to promote recreational and tourist use of the areas of the city of Guadalajara that are not well known, considering that it may have a greater attraction for national tourism, since the proximity of these areas can be very attractive for people who live in the city of Guadalajara and have the taste to enjoy natural environments near them. It is also intended that it can serve as support the development of new programs either for the Secretary of Tourism (SECTUR), see figure 1.

RESEARCH OBJECTIVES

Determine the feasibility of the Santiago river canyon being a tourist and ecotourism attraction for the Guadalajara, Guadalajara brand, for national tourism.

Expose places of tourist attraction of Guadalajara, for recreational uses.

Present the profile of the ecotourism.

Expose the training of qualified personnel to attend the national Eco tourists

Hypothesis

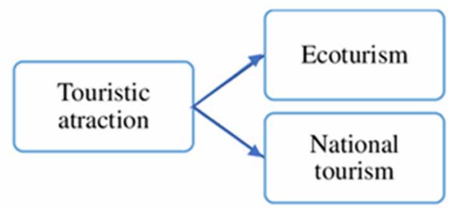
Is it possible that the Santiago river canyon is a tourist attraction and ecotourism for the Guadalajara brand, with a focus on national tourism?

Expose that the Barranca del Rio Santiago is a tourist and ecotourism attraction in Guadalajara.

Is the ecotourism sector profitable for national tourism?

Are there enough trained personnel for the ecotourism sector?

Figure 1. Research model
Source: Own elaboration.



LITERATURE REVIEW

As it can see in the literature review, although there are several investigations that expose it to ecotourism, tourist attractions, city marketing and the ravine of the Rio de Santiago, so far there is no research that integrates the above, being the void of literature. Therefore, the research focused on integrating the variables to show if the Barranca del Rio Santiago is a tourist attraction and ecotourism is attractive to be included in the Guadalajara brand, focused on national tourism, see Figure 1.

CONTEXTUAL FRAMEWORK

Tourism

Tourism is the sum of the phenomena and relationships that arise from the journey and the permanence of non-residents, as long as they do not establish a permanent residence and do not relate to any remunerated activity. This definition was entrusted to Professors Hunziker and Krapf, likewise Troisi defines it as the set of temporary transfers of people originated by needs of rest, cure, spiritual or intellectual (Betancourt, 2008). Later authors like Burkart and Medlik define that they are the short and temporary displacements of people towards destinations outside the place of residence and work, and the activities undertaken during the stay in those destinations (Sancho, 2008).

Mathieson and Wall mention that tourism is the temporary movement of people, for periods of less than one year, to destinations outside the place of residence and work, the activities undertaken during the stay and the facilities created to meet the needs of the tourists (Sancho, 2008). Professor Arriaga mentions it as tourism is all temporary displacement determined by causes beyond profit: The set of goods, services and organization that in each nation determine and make possible those trips, and the relationships and events between them and travelers take place (Betancourt, 2008). However, after so many definitions, the World Tourism Organization (UNWTO) in 1994 is defined as tourism includes the activities carried out by people during their trips and stays in places other than their usual environment, for a period of time consecutive less than a year for leisure, business and other purposes (Sancho, 2008).

In this research the UNWTO definition is used because it is the main international organization in the tourism field with 158 countries, six associate members and more than 500 private members (UNWTO, 2018). Authors such as Óscar de la Torre Padilla, defines it as tourism is a social phenomenon that consists in the voluntary and temporary displacement of individuals or groups of people who, mainly for recreation, rest, culture or health, move from their place from habitual residence to another, in which they do not exercise any gainful or remunerative activity, generating multiple interrelations of social, economic and cultural importance (Betancourt, 2008).

Tourism is an economic force, which has the power to implement projects that maintain the natural appeal that visitors want to see and experience. The economic benefits of tourism depend on the way in which tourist attractions are kept safe, clean and pleasant to the senses (Rebollo, 2012). As important is the tourist development has brought strong impacts on the environment such as river pollution, acoustics, aesthetics. Although the most important impacts include the loss of biological diversity and the limitation of natural resources on which tourism activity is based.

This overexploitation of resources has increased in recent years to unsustainable levels. Tourism cannot work without the basic natural resources on which it is based since its own environmental degradation directly affects its supply and can endanger the tourist activity itself. For all these reasons, various organizations and conventions in recent years have become aware of the importance of conserving the natural environment to apply not only to the tourism sector but to all social areas to achieve sustainable development (Betancourt, 2008). As tourism develops, it must make the preservation of the environment a priority. The tourism industry will have to protect and preserve natural tourist attractions, the environment, fragile ecosystems and living cultures of remote regions. In this way tourists will continue to travel (Rebollo, 2012).

Alternative Tourism

Alternative tourism is defined by the SEMARNAT as the trips that have the purpose of carrying out recreational activities in direct contact with nature and the cultural expressions that surround it with an attitude and commitment to know, respect, enjoy and participate in the conservation of the natural and cultural resources. Alternative tourism is the product of international policies to conserve the environment and is a response in Mexico to environmental policies that aim to conserve natural resources (Rogel, Rojas, & Ortega, 2011). Like Neyra, he mentions that alternative tourism refers to there are other ways of doing things. For example, traveling and knowing places (alternative tourism), is not exempt from new alternatives, in this concept the most important thing is contact with nature and indigenous cultures, that is to say, soaking up what is specific to the region to visit (Rogel, Rojas, & Ortega, 2011).

National Tourism

The World Tourism Organization provides the following definition of national tourism: National tourism encompasses domestic tourism and outbound tourism, namely, the activities carried out by resident visitors inside and outside the reference country, as part of their tourist trips. inmates or issuers (UNWTO, 2008). It can also be taken as a definition that national tourism is practiced by nationals and foreigners residing in the country within its borders, that is, tourists who travel within the country do so for holiday reasons, recreation, congresses and conventions, work and / or business, etc. (Portugal, 2008).

Ecotourism

Ecotourism is according to Diamantis and Ladkin the direct result of global acceptance in favor of productive practices more sustainable and with less impact on the environment. However, another author is Jost Krippendorf who is considered the pioneer in this concept making a strong criticism to the mass tourism under the argument of its destructive potential in the environment and economy within the receiving communities, recognizing the need to look for a new option (Rebollo, 2012). The function of ecotourism is to protect and care for the environment, with the intention of not manipulating nature but contemplating and admiring its beauty. To know those who have lived forever in these ecosystems, from the ancestral cultures, to their flora, the healing qualities and their fauna to respect the place. Usually ecotourism centers are found in ecologically protected areas (Rebollo, 2012). Similarly, it seeks to break with the idea that what is legitimately tourism is only in large hotel chains, entertainment centers, restaurants and finally that the natural space must be transformed at the convenience of being human (Melo, 2013).

Tourist Attraction

As one of the first definitions we find Zimmermann, who defines it as the tourist attractions are tourist resources that have the necessary conditions to be visited and enjoyed by tourists, that is, they have tourist facilities, means of transport, services complementary and basic infrastructure. The tourist attractions should be considered as resources because they have generated an economic activity and represent foreign currency in a country's economy (Castellanos, 2015).

For its part, Acerenza identifies the tourist attractions as the most important component of the tourism product because they determine the selection, by the tourist, of the point of destination of their trip, and are the ones that generate, therefore, a current tourism to its location and also points out that they constitute the main reason for the tourist to visit the destination and are able to satisfy the primary motivations of tourists' travel (Navarro, 2015). Finally, the dictionary of tourism, hospitality and transport, offers a definition of tourist attraction, which says that considers that it is an object or event capable of motivating a tourist to leave his home to move to know him (Wallingre & Toyos, 2010).

City Brand or City Marketing

The term City Marketing has been misunderstood on many occasions, reducing it to a mere promotion activity through which to show a city, mainly in the face of tourism, relying on more or less recurrent speeches: brochures with photos of the main monuments, regional costumes, local cuisine and party program. But what is talking about is a much broader and more powerful conception. It is about transferring the focus and marketing tools that are applied to a company or product, to the city, as an essential tool in the development of their strategies and their competitiveness (Romero, 2009).

City marketing is conceived as the city in the marketing as a product, which faces a competitive market formed by thousands of municipalities and where millions of agents converge, also directs its activity towards the citizens of the municipality visitors, tourists and the investors this according to (Betancourt, 2008). However, it is known that the term of City marketing was introduced in European literature in the 80's. The City Marketing for Kotler, Haider and Rein is constituted as a strategy of development of the city oriented to satisfy, better than other competing cities, the needs of the current and future users of all the services of the city (Heredero, 2015).

Other authors mention that globalization and the extension of competition, the value creation of the local: the rapid evolution of communication tools and, finally, the evolution of marketing are factors that undoubtedly determine urban marketing city (Benko, 2000). It can be also found another definition about city marketing and it is defined as City marketing can be defined as an active policy of actions oriented, on the one hand, to identify and determine the needs of its different public, real and potentials; and another part to develop a series of products and services in the city to meet those needs, creating and enhancing their demand (Rojano & Castilla, 2007).

THEORETICAL FRAMEWORK

Tourism

It is said that tourism comes to diversify the economy providing foreign exchange necessary to boost economic development, but also the proponents of the development of tourism argue that tourism not only generates foreign exchange, but also alleviates a little the problem of unemployment and long term can provide a substitute for traditional exports whose fruit is more insecure than tourism (Portugal, 2008). But always have to take into account the tourist demand which make up tourists, travelers and visitors, after this term is a heterogeneous group of people, an aggregate of personalities with different characteristics and interests such as: social, economic, recreational (Portugal, 2008), in these demands is a group called minority tourism which are characterized by traveling individually, family and in groups, their chosen nuclei are little touristy and do it at any time of the year because their economic possibilities allow it (Portugal, 2008).

While it is true that there are many types of demand, this segment prefers that the consumer of this type of service, could give a better idea of the activities and products that must be offered. Not without first clarifying that, for each activity or specialty in particular, there is a market segment with its own characteristics (Rogel, Rojas, & Ortega, 2011), that is, each segment has its profile well specified. Undoubtedly, the demand is important, but it is also important to say that the trips have as a purpose to perform recreational activities of appreciation and knowledge of nature through contact with it. These activities can be observation of stars, observation of flora and fauna, hiking, environmental education, biological research, observation of attractions and special phenomena of nature, and observation of natural attractions among others (Rogel, Rojas, & Ortega, 2011).

As natural resources, Tourism Secretary (SECTUR) in the year of 2005 mentioned that natural or cultural resources are the environment, the archaeological wealth and the historical expressions of tradition, these are considered the base of the tourist product, so that this resource becomes attractive tourist man must incorporate facilities, equipment and services, thus adding value in economic terms (Portugal, 2008). But as to know if a place has tourist attraction or not, in this sense, the CICATUR-OEA (Inter-American Center for Tourism Training of the Organization of American States) proposed in 1974 a scale of valuation of tourist resources that quickly spread in Latin America and of practically exclusive use until now, as shown in Table 1 (Navarro, 2015).

Table 1. Hierarchization of tourist resources

Hierarchy 5	Exceptional attraction of great significance for the international tourist market, capable on its own of motivating an important current of visitors (current or potential), quantified as a percentage of the total demand of the country, or of a specific market. Equivalent to the only resource in the world.
Hierarchy 4	Attractive with exceptional features in a country, capable of motivating a current (current or potential) of visitors of the internal or external market, but in a lower percentage than those of hierarchy 5, either by itself or in conjunction with other attractions contiguous. Equivalent to a single resource in the country.
Hierarchy 3	Attractive with some striking feature, able to interest long distance visitors, whether from the internal or external market, who had come to your area for other tourism reasons; or to motivate local tourist currents (current and potential). Equivalent to a single resource in a subnational jurisdiction.
Hierarchy 2	Attractions with sufficient merits to be considered important for the domestic market, but without conditions for receptive tourism and that are part of the tourist heritage». Equivalent to a single resource in a locality.
Hierarchy 1	Attractiveness without sufficient merits to be considered in the previous hierarchies, but also part of the tourist heritage as elements that can complete others of higher hierarchy in the development and operation of any of the units that make up the tourism space. Equivalent to complementary resource.
Hierarchy 0	Attractions whose qualities do not allow them to be incorporated into hierarchy 1, which is the minimum hierarchical threshold. Equivalent to a resource without relevant characteristics (it is not a tourist resource).

Source: Navarro, 20015. Tourist resources and tourist attractions: Conceptualization, Classification and Valuation. Tourism notebooks. Retrieved from http://www.redalyc.org/pdf/398/39838701014.pdf

Similarly, there are other ways to classify a tourist attraction, since other authors say that it should analyze tangible and intangible resources, which are amenable to tourism and consider the potential for attraction, which may motivate a non-profit movement; in the same way the accessibility of arriving; signage with tourist guides, brochures, urban signs; the level of affluence; the level of use; the elements of valuation; and the current or possible activities related to the local resource (Navarro, 2015).

However, it can also be carried out with the following hierarchical criteria: first those that do not have sufficient merit but that can complement others of higher hierarchy: then those that have some striking feature and motivate those who arrive at the place by others attractive, then those that have exceptional features with the capacity to motivate national demand, either alone or together with other attractions; and finally those that have exceptional features and great significance for the international market capable of motivating the tourist displacement of that demand alone (Wallingre, 2011).

Ecotourism

Ecotourism is perhaps the word that has commercially been more successful in the development and marketing of a novel tourism activity, associated with the use of the natural and cultural resources of a region. Due to its commercial success, it has also been lent to an indiscriminate use that has forced the creation of new terminologies that allow the product to be differentiated and to guarantee its quality in some way (Báez & Acuña, 1998). For Latin America, some events that refer to the general background of the adoption of ecotourism in Latin American countries are presented below (Table 2)

Sustainable in Latin America (Mexico, Costa Rica and Ecuador). The College of the Southern Border. University of Sherbrooke.

Ecotourism must be developed under the following values and must be followed by both the tourist and the local people:

Table 2. General antecedents of ecotourism in Latin America

Date and venue	Event	Agreements and achievements
December 1974 San José, Costa Rica	"First Central American Meeting on Management of Natural and Cultural Resources"	It was proposed the creation of a system of parks and reserves in areas of great environmental and cultural diversity and with high tourism potential. It was also proposed to set up a regional committee for the conservation of resources and adapt legislation for efficient management (CATIE, 1989).
1974 Coyococ, Mexico	"Seminar on Models of Utilization of Natural Resources, Environment and Development Strategies"	In this seminar, alternative models of socio-economic development were determined that contemplate the environmental and cultural characteristics of each region in order to reduce the inequity generated current modes of consumption and production (González, 2001).
October 1975 El Salvador	"IV Meeting of Ministers of Agriculture of Central America"	Based on this meeting, the conservation, restoration and treatment of natural resources was established as a priority, as the basis for welfare and local development (CATIE, 1978).
1986 Caracas, Venezuela	"Workshop on planning of national systems of protected wild areas in Latin America"	It was agreed that in Latin America there should be a system of legally recognized protected areas for these areas to be operated efficiently (Cracco, 2006).
1987 Guatemala	Second "Central American Meeting on Management of Natural and Cultural Resources"	The objective was to establish strategies to strengthen the system of protected natural areas and promote conservation for local development (CATIE, 1989).
1988 Chile	"International Workshop on Interpretation in Wild Protected Areas"	General aspects on the management of protected areas in Latin America were addressed (FAO, 1988).
1991 México	"International Workshop on management of biosphere reserves"	From this workshop, it was recommended the inclusion of evaluation and monitoring components in the management of conservation areas (Cracco, 2006).
1992 Guadalajara, México	"Ibero-American Congress of Environmental Education"	Programs were implemented to train environmental specialists and the organization and communication between environmental educators was promoted (Ruvalcaba, 2010).
1992 Caracas, Venezuela	"Tourism in Protected Areas" and "IV World Congress of National Parks"	It was recognized that tourism contributes to the conservation and development of local communities (United Nations, 2001), as well as the importance of monitoring and monitoring in environmental conservation (Cracco, 2006).
Octubre 1995 Quito, Ecuador	"Meeting for Latin America on the management of national education and training programs for the environment and development"	Based on this meeting, the Environmental Education Network of the International Union for the Conservation of Nature was implemented (IUCN) -Sur (Ruvalcaba, 2010).
2009 Caracas, Venezuela	"First Central American Congress of Ecotourism"	The congress proposed the following recommendations: creation of national councils of ecotourism, education programs in ecotourism, reinvestment for conservation, cooperation between tourism organizations and policies for the development of ecotourism, mainly (United Nations, 2001).

Source: Aragón, M. (2014), Ecotourism analysis as a development alternative

1. Responsible for the use and management of tourist attractions.
2. Respectful of the communities where the activities are carried out.
3. Honest with the product to preserve its authentic conditions while presenting to the tourist.
4. Educational so that the visitor acquires new knowledge of the visited place.
5. Interactive by allowing direct contact with natural and cultural resources.

6. Democratic so that the benefits obtained are shared equally (Romero, 2008).

Profile of the ECOTOURIST (Báez, A. 1996)

1. Interested in having direct contact with nature
2. Interested in knowing different ways of understanding and living life (which seeks a cultural exchange)
3. Willing to learn, always active and dynamic
4. Generally educated and with some prior knowledge about the destination, the resource to visit and the possible activities to be carried out
5. Careful of your physical and emotional condition
6. Prefers direct contact with people and seeks to establish friendships • Prefers a personalized service with a quality seal
7. Is willing to collaborate with initiatives for better waste management, reduction of water and energy consumption and any other effort to reduce the negative impact.

To any ecotourism activity, whether at the national, regional or local level, it is essential to build inventories of ecotourism attractions, both existing and potential, since the national inventory of ecotourism attractions is nothing more than the sum of the different regional ecotourism inventories (Lascuráin, 1998). As part of the inventory of natural resources are lakes, rivers, beaches, mountains, valleys and meadows. They not only allow to extract food and raw materials, but they are also admirable for their great beauty, therefore, these natural resources are also considered as tourist inventory (Rebollo, 2012).

It is possible to identify areas and natural attractions as the most important elements of the tourist system that motivate the visit and that offer tourists experiences and unique memories, because first there are the natural resources and the components of their environment. Lakes, lagoons, mountains, valleys, deserts, jungles, plains, beaches, estuaries, hills, mountains, ravines, snowy mountains and second place is any destination is characterized mainly by its type of ecosystem, i.e. the nature and appearance of its landscape; and its climate, the type of cold conditions of heat, humidity, winds, height and specific characteristics given by its altitude and location in the hemisphere (Rebollo, 2012). The ecotourism attractions of an area can be classified into three basic categories:

1. Focal attractions: which from a specific area or region will always refer to the distinctive elements of natural and / or cultural heritage found in that area. They are those intrinsic features of uniqueness that best characterize said site or region and the fundamental reason why Eco tourists will want to visit it. Some protected areas exist due to a very special or determined resource that they possess and therefore, also constitutes their main focal attraction.
2. Complementary attractions: they also refer to elements of natural and / or cultural heritage that are located in a certain area, but do not have the degree of importance or uniqueness in terms of the tourist attraction of the focal attractions. That is, by themselves alone they may not exercise enough attraction to motivate an ecotourist or move to that site. However, they are motivated by additional interest and added value for the ecotourist, contributing to a tourist experience of greater wealth and diversity, by indicating the visitor to stay longer in the area in question and to offer the possibility of additional activities. The complementary ecotourism attractions can also help to avoid

excessive concentrations of tourists in one place and, at the same time, favor the displacement of visitors to various sites in the corresponding area.

3. Supportive attractions: These are constituted by the artificial elements already in facilities or services, which provide the visitor with different satisfactions. This includes accommodation, restaurants, interpretation center, trails and viewpoints, horseback riding or boat services, etcetera. The support attractions are always added afterwards, to support the focal and complementary attractions that already exist, by their own nature, in a given ecotourism destination (Lascuráin, 1998).
4. For the average tourist, mere contemplation in a protected area of huge concentrations of waterfowl, is in itself an attraction of the highest level. Although it does not know the specific name of birds, the enormous concentration of these and the form or the different color of some of them will be enough to cause a deep impression in any visitor with a minimum of sensitivity. However, true Eco tourists, both national and foreign, will want to know more about the regions they visit: the structure of their ecosystems, their geological origin and evolution, the main ecological interrelationships that occur there, the regional cultural elements, their environment geographic and the names of the most characteristic or striking plants and animals that are found there, that is, of the focal species (Lascuráin, 1998).

One of the first formal studies that were done about the ecotourism situation in Mexico was the text of Ceballos-Lascuráin in 1994 called National Ecotourism Strategy. In it, a complete diagnosis of the state that kept this activity in the Mexican context, the competitive advantages were described and the need to carry out more research about the economic impacts of this activity was indicated. An action plan is also presented which mentions different parties such as the creation of mechanisms for inter-institutional cooperation, the creation of an inventory of ecotourism products, the creation of an inclusive strategic plan, the design of manuals for the management of environmental and cultural impacts, carrying capacity, training, promotion and the establishment of self-financing mechanisms directed mainly to the conservation of the environment.

Lascurain ends by concluding that ecotourism in Mexico was in its first steps and that following an action plan would ensure a well-organized and oriented development (Guerrero, 2010). However, Rodriguez in 2010 in his article concludes that ecotourism in Mexico is, just a promise. Undoubtedly ecotourism can become a powerful tool for development at any latitude. However, in the case of Mexico, the evidence suggests that this is still not the case and that the outlook is not very favorable for this situation to reverse. The political agenda of Mexico must contemplate the creation of necessary conditions to counteract the above, so that activities such as ecotourism can grow and develop in a positive manner.

Ecotourism promotes the integration of the tourist with the local community through guided walks in areas of fragile ecosystems; such as rainforests or protected natural areas. In this way, possible environmental damage is monitored and it is possible to avoid or minimize it. Through ecotourism it is also possible to amend environmental damage caused previously (Rebollo, 2012).

The City Marketing

The image of a city is the synthesis of its identity, which is defined by the sum of permanent attributes that make up its essence and serve to differentiate it from other cities. Therefore, the identity of the city has a double dimension: functional and cultural. The functional dimension is specified in its strategic purpose, understood as its raison d'être, and is expressed through its city model, which is nothing more than its strategy to achieve its main objective in the medium and long term, starting from of the set of functional and formal policies. The corporate culture, another dimension of the image of identity, is composed of the values shared by all citizens and their presumptions about their city, the environment and everything that may influence it (Betancourt, 2008).

The projection of the image of a city is based on an imaginary, which considers architectural landmarks as "tangible" referents for its inhabitants as well as for visitors, in addition to multiple cultural factors that contribute to forming an "intangible", which significantly affects the perception and choice of products, services and tourist destinations. According to the vision of Mea Della, this is built through a complex process of influences, in which multiple factors of different order intervene:

1. **The Natural:** Climate, geographical attractions, soil.
2. **The Economic:** Level of development, activities, products and local brands, services, corporations, technology.
3. **The Politicians:** System of government, institutional development.
4. **The Geopolitical:** Historical link with cities, departments.
5. **Sociocultural:** Population, educational level, cultural expressions, quality of life. (Mancilla, Morales & Lugo, 2012).

City marketing is focused on three basic aspects:

1. **For Investors:** It is the one that seeks to attract investors and foreign companies, for the creation and / or expansion of new businesses, with the intention of bringing development at the economic level and that is reflected in the increase of capital and sources of employment.
2. **For Residents:** This is what seeks to attract new residents to the cities, seeking to increase their productive population through attractive programs to obtain permanent resident visas.
3. **For Visitors:** It is the one that seeks to attract temporary visitors, to encourage tourism and at the same time attract important capital that encourages different tourist sectors.

Specifically, City marketing performs four basic functions:

1. Achieve an optimal combination of the characteristics and services of the city, from the point of view of residents, visitors and investors
2. Articulate an offer of incentives that increases the attractiveness of the city for current and future users of its services
3. Ensure a fast and efficient access of the city to the markets of interest
4. Transmit the image and comparative advantages of the city to the target public.

Undoubtedly, brand management has become one of the mandatory issues for governments and private and public organizations in cities and countries. As are the natural: climate, geographical attractions, soil; the economic: level of development, activities, products and local brands, services, corporations, technology; the politicians: system of government, institutional development; the geopolitical: historical link with cities, departments; the sociocultural: population, educational level, cultural expressions, quality of life. Once again, the management front becomes very important, because thanks to its planning, important achievements can be seen in the strengthening of competitiveness and the image of cities and countries (Martínez, 2007).

Daniel Ivoskus tells that the brand is not a product and this affirmation must be maintained when creating a city brand, which will be recognized in a certain territory. Many authors have tried to classify the city, either by population, geography, maturity, qualitative criteria such as specialization, safety, financial flow, and so on. Marín (2010) and Pablo Lezama give some examples of the city brand as the work on the Barcelona brand, the famous I love NY, Milan or the Armani city, the Argentine Patagonia, Los Angeles and Hollywood; and in addition to places, neighborhoods such as: Tribeca and Harlem in New York; Palermo Soho, Barracas Dulce and San Telmo Gay in Buenos Aires. All these are some of the examples of the positioning that was chosen to be constructed to differentiate itself from other places in the world (Marín, 2010).

The Guadalajara Brand

The government of Zapopan made a presentation of the Guadalajara brand where the former City Major if Guadalajara Enrique Alfaro mentions that the city brand is a reference to avoid the loss of his identity, likewise commented that the brand cares is an element of identity, it is a promotional and positioning tool of Guadalajara that for many years the city needed, that the private sector had requested and that now exists thanks to the will to build a policy of agreements (Government of Zapopan, 2016). In the presentation of the brand, the Governor of the state of Jalisco, Aristóteles Sandoval, also participated. He mentioned that the names of the cities are trademarks, they are reference on an identity.

They have become strategic assets. Having a strong city brand serves to identify, cohesion, and reuse citizenship. It serves to project internationally, attracting projects and investors. "It should be noted that Pablo Lemus also made some comments which are we are one voice, today we show that our identity is to be a Guadalajara. It is a pride to belong to this city, a brand that will have great benefits for all. This is a historical fact that gives voice to #GuadalajaraGuadalajara congratulations to all that today its brand is presented, our brand " (Valenzuela, 2016).

The city of Guadalajara is the second most populated city in Mexico, after Mexico City, with this exercise of identity it is intended to promote and position the metropolis internationally, increase the tourist influx and continue attracting investments from abroad (García, 2016). The creators of the Guadalajara Guadalajara brand, mention that they took advantage of the great opportunity to build the first sound mark in the world, since the brand is based on the song composed by Pepe Guízar, which represents a natural symbol of the city that reinforces and provokes sensations, emotions and ideas already positioned. The song has the characteristic rhythms of the mariachi and its lyrics take up essential elements of the identity of the city and the region, condensing them into a single phrase: Guadalajara Guadalajara, which is read singing, since it is already positioned at the international level (Valenzuela, 2016).

A very expressive logo has been created, with typographies that vary in size and that remind of the codes used in comics, where try to capture the musicality of this famous chorus in the logo, as mentioned earlier. The typography is the Chinese Rocks Regular, which is used to give a rustic touch that aims to add value to the heritage of a pre-industrial past, where shops or even posters displayed a more standardized and manual design. The brand also has three main and alternating colors: magenta, orange and cyan, which emphasize the colorful character of Mexican folklore (García, 2016).

A reinterpretation of the song was carried out, in which mariachi was mixed with traditional music, elements of rock, electronic and jazz, also collaborated artists such as Venado Azul, a wixarika group of regional music; Telefunka, an electro-acoustic music group; Cuca representing heavy, disruptive rock; Paco Padilla or the Mariachi Viva Xalisco representing the traditional of Mexican music, with; Sara Valenzuela and Abigail Vázquez, outstanding exponents of jazz; Mike Laure Jr. with popular music; in addition, Cecilia Toussaint, Celso Piña, Alfonso André, "the Vampire", Pato Machete, Dr. Shenka with the purpose of integrating all of Mexico (Valenzuela, 2016)

In the competitiveness agendas of tourist destinations in Mexico, it is mentioned that Mexico has not been able to take advantage of the total benefits offered by tourism. A clear example of this is the city of Guadalajara, which is one of the most emblematic states of Mexico. This city is highlighted by its great cultural contribution, tradition and historic buildings, however, has not known how to take advantage of the natural heritage that has to recreational use or tourism, since it has great potential in this sector. There it is entered one of the attractions which is the Santiago river canyon (SECTUR, 2014).

The Canyon of the Santiago River

The Santiago river canyon is a natural element of great value, given its level of landscaping, since it has a variety of resources with tourism potential that have not been conveniently used for recreational and tourist use. In addition to the landscape, the canyon contains an important number and variety of resources with tourist potential that until now have not been conveniently used for recreational and tourist use (SECTUR, 2014). This canyon is a resource of such importance that legal instruments have been created for its protection and conservation. The municipality of Guadalajara decreed the area as an Area Subject to Ecological Conservation, while the municipality of Zapopan granted it the category of Municipal Area of Hydrological Protection.

At the federal level, there is a proposal to decree the Barranca del Río Santiago, along the Barranca del Río Verde, as a Protected Natural Area (ANP), without formalizing its legal implementation until now (SECTUR, 2014). However, it is necessary to highlight the environmental problems present in the ravine, since it is one of the most polluted rivers in Mexico due to domestic and industrial discharges, which are mostly not treated. This situation reduces the potential of the Santiago River, which, in its natural context, could well be used for recreational purposes. Despite the condition of the river, the canyon still has a high potential for tourism and recreational use, but public policies aimed at comprehensive sanitation of the Santiago River basin need to be implemented, as well as the implementation of productive and tourist projects that detonate the local development of the area (SECTUR, 2014).

A geographical fact of great magnitude is the one made by the Santiago River over what is now the Barranca that bears his name, giving rise to a depression that in its most eroded part can reach 500 meters of depth, according to the INEGI in the 2010 (SECTUR, 2014). This geological outcrop houses a gallery forest that contains various species of fauna, but especially flora, some of them are even listed as endemic, a situation that makes the Santiago River Canyon even more attractive to be studied and conserved. The problem of this geographical element is the contamination of the Santiago River, which carries all domestic and industrial waste from the Lerma-Chapala-Santiago Basin; however, its main problem is the lack of recognition and appreciation by local inhabitants (SECTUR, 2014). The Barraca del Río Santiago is a natural scenario with great potential for tourism.

In the decade of the 70's a tourist, complex was projected for the Barranca del Río Santiago, corresponding to the municipality of Zapopan, where the installation of one or more cable cars, botanical garden, restaurant, bungalows, and others, was contemplated facilities of Mirador Park Dr. Atl, however, it was only in the proposal. In 2005, Guadalajara won the headquarters to house the Guggenheim Museum, which would be located in the grounds surrounding the Mirador Independencia Park in the Santiago River Canyon. In 2009 the project was canceled due to lack of budget. In December 2009 the project "Barranca Museo de Arte Moderno" was announced, which came to replace the Guggenheim.

The project has an approximate cost of 30 million dollars and for 2013 it has an advance of 80% in its structure. Currently it is planned to make a cable car possible even with Mexican technology, such as Personalized Elevated Urban Transportation (TUEP), proposed in Mexico City, with the support of the Dina Consortium. It is also proposed to rescue the existing infrastructure to install a funicular that goes from Huentitán to the bottom of the Barranca, in the town called Las Juntas in the municipality of Guadalajara and a cost of 320 million pesos is contemplated, which would be invested in an approximately three years (SECTUR, 2014).

According to Martínez in 1984, the Barranca is an impressive broken wall of section in section, by the gaps that in its North Slope have opened the rivers that contribute their waters to the Santiago. The panorama that is seen in front of Huentitán, La Experiencia, San Cristóbal, is that of a rock curtain whose almost horizontal folds composed fire and water millions of years ago. The Santiago, "tireless sapper of the Barranca", looks ostentatious to the amazement of passers-by and tourists, analysis and study of geologists and headache of bridge builders, railroads, winches and roads (SECTUR, 2014). The potential resources in which they can do better and create recreational activities are presented in Table 3.

There are sites for an adventure in Zapopan as it is the Huaxtla.org site official site of Adventure in Zapopan. This is a non-profit page that seeks to give visitors information about the wonderful routes in contact with nature that Jalisco has and in particular the municipality of Zapopan, to know the Huaxtla Canyon, the Spring Forest, El Cerro del Diente or any other Adventure within the municipality of Zapopan. (Huaxtla, s.f.).

METHODOLOGY

The methodology of the investigation is made up of a quantitative approach, since for the resolution of contributions, statistical data from a database provided by the government of the state of Jalisco with the intention of giving annual results for the year 2016 were taken into account. The indicators to be rescued were the following: first the motivation to the tourist destinations, means by which they found out, what they liked the most, opinion about the service, as they consider the natural attraction, means by which they arrive to the destination and average cost. This in order to determine if national or domestic tourism is interested in tourism and ecotourism factors.

Type of Study

The type of research is exploratory. Exploratory studies are usually carried out when the objective is to examine a research topic or problem little studied or that has not been addressed before. That is, when the review of the literature revealed that there are only uninvestigated guidelines and ideas vaguely related to the study problem. Exploratory studies help to increase the degree of familiarity with relatively

Table 3. Resources with tourism potential in the Santiago River Canyon (ZMG)

Resources	Sites	Location	Observations
Waterfalls	Las siete cascadas Cola de caballo La soledad San Lorenzo	Tonalá Zapopan Zapopan Zapopan	Only in rainy season Inside Parque Mirador Dr. Atl On the channel of the stream La Soledad On the channel of the stream Milpillas
Viewpoints	Huentitán Parque mirador independencia Dr. Atl Parque Dr. Atl	Guadalajara Guadalajara Guadalajara	Canyon of Huentitán In this place it is building the Modern and Contemporary Art Museum of Guadalajara (Canyon museum) It is quite deteriorated without attention of Municipal Government
Water bodies	Arroyo la soledad Arroyo milpillas Geiserés de la Soledad	Zapopan Zapopan Zapopan	Cleanest tributary of the Santiago River Located on the channel of Arroyo la Soledad
Canyon	Cañón Azul Turqueza Cañón del Río Santiago	Guadalajara Tonalá, Guadalajara and Zapopan	It is the canyon formed by the stream La Soledad Geographical accident of high landscape and environmental value for the GMZ
Elevations	Peñón de Los Camachos	Zapopan	From there it is possible to observe a panoramic view of the Barranca
Caverns	Grutas de los Camachos	Zapopan	
Spas	Los Camachos San José Huaxtla	Zapopan Zapopan Zapopan	First spa of Guadalajara Community business
Routes (Hike, trekking, hiking)	Huentitán Oblatos Ixtacán-La Soledad-Huaxtla	Guadalajara Guadalajara Zapopan Zapopan	Canyon of Huentitán Canyon of Oblatos Also as a bicycle route
Cultural and historical manifestations	Puente de Arcediano Fiesta de los Tastoanes Templo de Ixcatán Templo de San esteban	Guadalajara Zapopan Zapopan Zapopan	First suspension bridge in Mexico In the locality of ixtacán Franciscan construction dating from 1580. Franciscan construction which starts in 1691 and ended in 1726.

Source: SECTUR (2014). Agendas de competitividad de los destinos turísticos de México *Secturjal*. Recuperado de https://secturjal.jalisco.gob.mx/sites/secturjal.jalisco.gob.mx/files/u16/agenda_guadalajara.pdf

unknown phenomena. In the case of research was found that there is little, almost nonexistent information about the Santiago river canyon.

The research also uses the descriptive type. A descriptive study selects a series of questions and each of them is measured independently, in order to describe what is being investigated, along the investigation described tourist attractions, ecotourism and city marketing. It should be noted that it is a documentary dissertation, since everything was based on information and there is no sample, no population, no surveys.

Data Analysis

Based on a study conducted by the government of the State of Jalisco, the following indicators were taken:

1. The means of information by which they learn of a destination 53.1% by recommendation, 17.2% Internet, 12.5 by which already knew the place, 5.8% travel agency, 3% by mass media and 8.5% by other means.
2. What they liked most were 28.8% tourist attractions, 25% hospitality, 13.12% destination, 8% recreational activities, 6.3% commerce, 5% tourist services, 4.1% gastronomy, 3.1% climate, 2.5% temples.
3. The opinion on the service is: personal treatment 89.9% said excellent and 10.1% said that regular, the price quality ratio, 78% said excellent, 17% said regular and 5% said bad: cleanliness 88.3% said excellent, 10.4% said regular and 1.2% said bad.
4. Different aspects as natural attractive 88.1% said excellent, 8.9% said regular and 3% said bad; Leisure activities 90.1% said excellent, 9.7 said regular and .2% said bad. The means of transport used to reach the destination is 46.1% automobile, 53.1% bus.

CONCLUSION

As conclusion of the investigation, it is mentioned that the Guadalajara Guadalajara brand only has a cultural and historical focus, leaving behind the ecotourism aspect, which according to the tourism secretary there is a great potential. As it has been mentioned in the competitiveness agendas it has been known to make the most of the Santiago River Canyon. On a national level, the city of Guadalajara is positioned, thanks to the fact that it is based on a very famous song by the composer Pepe Guízar, most Mexicans have ever heard it. So broadening an approach of not only seeing the city in an architectural, cultural and religious way, it can be extended to other sectors.

From a national tourism and ecotourism perspective, the answer to our research problem is whether the brand can be extended to this sector with the intention of being able to generate more tourism towards these types of places, along with an extension of work for the hotel industry, to carry out recreational activities that comply with the regulations of the corresponding institutions so as not to cause the already deteriorated ecosystem, but on the contrary to obtain support to be able to clean the area and have one more resource.

However, there have been certain limitations for any improvement project to be presented since the majority must be presented to the secretary of tourism and the next elections in the country each time the strategies are changed depending on the new projects of each governor. This causes that the long-term plans are not feasible. Similarly, it is in conflict since the Guadalajara brand is in the public sector, there is still no support from the private sector, which is why it is more complicated.

Proposals

1. As a first proposal is the realization of a map that indicates the access and the route to reach the different destinations of the Barranca, since, due to the ignorance of many of the potential tourist attractions, access to these places is difficult, they are not marked, and do not have a structured route.
2. The second proposal is the creation of different zip lines that are attractive to different audiences and ages of visitors. As it can be that of Huentitán to the Boards.
3. Third proposal, that there be a control of contamination, that is, the treatment of wastewater from operation, a good management of solid and liquid waste, the planting and care of the environment or of natural resources, in order to increase the tourist attraction of the place.
4. Fourth proposal to provide support to travel agencies for the preparation of advertising, where they are encouraged to make short trips to the different attractions of the Barranca del Río Santiago. In order to take advantage of the place and boost employment in the tourism sector, the training of employees in order to provide a quality service and experience for people living near the GMZ.

RECOMMENDATION AND LIMITATIONS

The existing limitations are that there is not much information about the activities that can be carried out in the Santiago River Canyon, in the same way it is important to mention that some areas are not in suitable conditions, because they are contaminated or deteriorated. For this reason, it is recommended that a certain amount of money be invested for the restoration of these areas in order to gradually enable it, so that it can be a potential tourist attraction for the inhabitants of the metropolitan area of Guadalajara, and equally to generate more jobs. In the same way, more research topics can be added to cover issues of restructuring of natural developments, business plans for the ecotourism sector, etc.

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Chapter 5
Critical and Inhibiting Success Factors in Interorganizational Networks:
A Case Study

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ABSTRACT

This chapter, based on a single case study, has as its main objective to analyze a real example of creating an inter-organizational network and to perceive what was done for the selection and creation of the strategic partnerships and inter-organizational network and what factors or conditions can inhibit these partnerships from having long-term success and throughout its life cycle. For this, a qualitative study based on action research and semi-structured interviews was conducted. Results show although many companies settle in inter-organizational networks to gain competitive advantage, cases of failure are still quite high. In this case, upstream partnerships have not been based on long-term trust and commitment, which has jeopardized the continuity of the network, although there is an express desire to re-establish contacts. The partnership established downstream did not show the same commitment to continue the partnership with a total termination of the relationship.

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INTRODUCTION

In a world increasingly influenced by globalization, broad markets make it difficult for companies to cope with rapid change and increasing competition based only on their skills, capabilities and resources. As such, it is crucial to establish long-term relationships with other organizations, thus entering networks to cope with any gaps or difficulties encountered in the markets.

The establishment of partnerships and the creation of inter-organizational networks (IONs) is increasingly common so that organizations can compete in a dynamic, global and competitive market. In order to create an ION, companies have to establish relationships with other entities in order to generate competitive advantage (Zakrzewska-Bielawska, 2019), being anchored in dyadic relations or in a network (Li, Jiang, Pei, & Jiang, 2017). These networks allow companies to specialize in their core business, carry out outsourcing activities more easily, be faster than their competitors and gain competitive advantage (Wong, 2011, Ribau, Moreira, & Raposo, 2019; Zimmermann, Ferreira, & Moreira, 2019). Thus, it is essential that IONs are composed of strategic partnerships, since together, companies can achieve goals that alone would not be able to. However, if IONs represent a relevant economic phenomena in a number of industries, the tourism sector is clearly underrepresented (Dagnino, Levanti, Minà, & Picone, 2015; Chim-Miki & Batista-Canino, 2017; 2018).

Although there is an increasing number of entities that establish relationships in global markets, failures among partnerships in IONs are quite high (Russo & Cesarani, 2017). In this way, it becomes important to understand the impeding/inhibiting factors for the long-term success of an ION. For this, it is necessary to identify and structure the key success factors (KSFs). Although there are some ambiguities regarding the definition of KSFs, most authors consider that they represent a significant way of influencing the position and competitive performance of an organization (Colauto, Gonçalves, Beuren, & dos Santos, 2004). Some of these KSFs are related to the history and culture of companies, the sharing of knowledge, trust and commitment among partner organizations (Resende et al., 2017; Ring, & Van de Ven, 1994).

This chapter has as main objective to analyze a real example involving the creation of an ION in the tourism industry and to perceive (a) what was done when implementing the strategic partnerships and (b) what factors inhibit these partnerships from having a long-term success throughout its life cycle. In addition, through a case study it is analyzed how upstream and downstream partners were selected, the challenges and opportunities encountered, since the expectations were found to be different upstream (complementary resources) and downstream (service provision).

Three phases of the development of an ION are compared, namely its design, operationalization and evaluation regarding which KSFs inhibited its success. For this, an action research method was followed based on the participation in a curricular internship during six months in a Portuguese travel agency. Complementarily, semi-structured interviews were conducted. The results show that although many companies establish IONs in order to gain competitive advantage, the cases of failure are still quite high. In this case, upstream partnerships have not been based on long-term trust and commitment, which has jeopardized the continuity of the network, although there is an express desire to re-establish contacts. On the other hand, the partnership established downstream did not show the same commitment to continue the partnership, which led to the termination of the relationship.

Some studies show that the networks failure rate is 50% (Russo & Cesarani, 2017; Li et al., 2017; Madhok, Keyhani, & Bossink, 2015), in this way this study responds to the reason for the continuity of the establishment of these partnerships and based on the three phases of the development of a partnership shows what can have inhibited its long-term success taking into account the KSFs.

This chapter is divided in six sections. The first section addresses the literature on inter-organizational networks covering the following subsections: strategic partnerships, upstream and downstream partnerships, the importance of the choice of partners, the importance of the definition of the objective of the partnership and the key success factors. The second section presents the research methodology used. The third section presents the case study of the firm under analysis and the results. The fourth section discusses the results. Finally, section five presents the conclusions and section six presents future research direction.

INTER-ORGANIZATIONAL NETWORKS

Many firms resort to IONs to create competitive advantage. Complementarily, the way in which these relations and networks are managed influence the performance of all the players (Connelly, Crook, Combs, Ketchen, & Aguinis, 2018; Chim-Miki & Batista-Canino, 2017; 2018; Ribau et al., 2019; Zimmermann et al., 2019).

IONs are a chain of actions consolidated by mediators (Latour, 2005), during which people and organizations are "interested" and "enrolled" (Paget, Dimanche, & Mounet, 2010). Networking is a necessity, otherwise companies feel a separation from the market. "*These networks can be social, institutional, technological, regional and/or virtual*" (Turunen & Nummela, 2016, p. 41).

Many firms, especially in the tourism sector, cannot be economically viable if they do not have the support of IONs, both locally and internationally (Turunen & Nummela, 2016).

Björkman and Kock (1997, p. 366) claim that networking is dependent on a number of factors, including: skills and education of the workforce available, research and development (R&D) institutions, ease of communication, public support systems and contextual environment. "*Companies are often dependent on co-operation with other firms embedded in the same business network, e.g. in order to get external resources and to gain access to customers*."

Zach and Hill (2017) defend innovation-based IONs, namely in the tourism industry. For them, innovation is a KSF that supports differentiation among tourist destinations. They defend that IONs need to be composed of the following categories:

- Heterogeneity of knowledge among companies;
- Commitment to leadership in innovation and collaboration;
- Quality of relationships between innovative partners;

One cannot talk about IONs without talking about interdependence, which implies that the actions of a single actor can influence the behavior of other members of the network and vice versa (Ramos-Vidal, 2017).

Dyer and Singh (1998) claim that for companies to exploit competitive advantages they need to be specialized or unique. As such, firms seek to build relationship with partner companies. For these networks to survive, firms need to willingly establish relationships that lead them to invest in creating specific assets.

Von Hippel (1988) defends that most innovations started from ideas and suggestions from customers or suppliers. Moreover, the knowledge transferred between customers, suppliers and producers lead to the creation of more innovative products when compared to products of companies that act on their own. Dyer and Singh (1998) conclude that a business network can be a source of competitive advantage. As such, some companies began to network in order to compete not between companies but between IONs.

For the creation of these IONs it is necessary to create relations between different actors, which involves negotiations, commitments and implementations (Ring & Van de Ven, 1994).

For the construction of an ION a negotiation phase is necessary. This phase consists of discussions and agreements between the parties regarding expectations and risks, which is expected to lead to the development of trust among partners. After the negotiation and confidence development phase, the actors enter the commitment phase, where the obligations and responsibilities of each partner within the network are discussed. It is at this phase that a formal or informal agreement is established between the parties. If, after the negotiation and commitment phases, one of these agreements is established, the cycle continues to the next phase, otherwise the development of the relationship and the network ends. When there is a "familiar" environment between the parties and they cooperate, we are in the execution phase. Depending on a number of factors, such as achieving the goals set out in the negotiation, the implementation phase may be both short- and long-term (Ring & Van de Ven, 1994).

One cannot talk about IONs without talking about interdependence. According to Möller and Halinen (1999), there is a business network when different actors come together for a specific purpose, with different periods of time and form (short-, medium- or long-term networks and formal or informal, respectively). These networks can take the form of associations, virtual organizations, subcontracting or strategic partnerships.

Strategic Partnerships

A strategic alliance is when two or more organizations decide to join forces to achieve common strategic objectives. (Mendonça, Varajão, & Oliveira, 2015, p. 1173).

When it comes to small and medium-sized enterprises (SMEs), strategic partnerships are important channels for inter-organizational learning, since they have limited resources and few internal capabilities for successful and continuous innovation (Subramanian, Bo, & Kah-Hin, 2018). There are several factors that affect inter-organizational learning in strategic partnerships (Subramanian et al., 2018): number of partners; the structure of the partnership; the relational attributes; the capacity of the partnership; and partnership management.

Regarding the number of partners, Shan, Walker, and Kogut (1994) claim that the learning opportunities available to a company increase with the increase in the number of partnerships the company establishes. Regarding the structure of the partnership, the following factors can have an impact on the configuration of the ION (Saito & Ruhuen, 2017; Subramanian et al., 2018): functional, geographic and technological diversity of partners; the technological distance between partner companies; structural holes and proximity; power; and centrality and network connectivity. For them, relational attributes involve trust and reciprocity developed through repeated partnerships. Strong bonds and cohesive relationships are key factors that influence collaborative learning.

Concerning the capacity of the partnership, Subramanian et al. (2018) claim that several partners absorb capabilities of other partners within the network, namely for internal R&D and for human capital. Finally, partnership management is typically achieved through governance mechanisms, teams designated to oversee partnership functions, and rotational leadership styles. Partnership management encompasses a company's ability to identify partners, initiate partnerships, manage collaborations, and close such relationships when necessary (Subramanian et al., 2018).

Although most studies address strategic partnerships to analyze why they succeed, there are certain studies that analyze why some partnerships fail (Russo & Cesarani, 2017). It is therefore important to understand what the obstacles to the creation and maintenance of these partnerships are.

Trust becomes crucial as the involvement of multiple stakeholders is a rather complex task that leads to fear of loss of influence or the exercise of power of each of them (Hall & Jenkins, 1995). This lack of trust among the actors can cause incompatibilities, duplication of actions, loss or misuse of resources, conflict of interest, internal competition and lack of support (Neves, 2007).

In addition to the importance of trust, it is also necessary to overcome the initial mistrust between partners. Aspects as the origin of the entities (public or private sector) are examples of possible conflicts that generate distrust between the actors (Long & Arnold, 1995). This mistrust is accentuated when actors have different values, norms of procedure, professional norms and conduct systems (Kanter, 1990).

In addition to these obstacles encountered before the creation of partnerships, some difficulties lead to the failure of the partnership. Since integration into a partnership implies sharing of resources, problems tend to increase when there is an inadequate distribution of tasks by workers (Neves, 2007; Saito & Ruhuen, 2017). In addition to human resources, financial resources also play an important role in the management of partnerships. As soon as new sources of funding do not emerge or the partnership ceases to be profitable, the viability of the partnership is called into question (Caffyn, 2000).

Kanter (1990) identifies some factors that lead to failure in partnerships: lack of planning and action policies; poorly defined and unclear roles; insufficient human resources; insufficient training; insufficient time spent on partnerships; difficulty in negotiating competitive values; gaps in communication and consulting; poor coordination; insufficient oversight; lack of monitoring and evaluation; and lack of strategies to end and limit partnerships.

Finally, Crotts, Buhalis, and March (2000) identify five issues that must be posed before the creation of a partnership: Do we want to integrate a partnership?; Do we have the necessary skills to integrate a partnership?; With whom will we join the partnership?; How should we integrate the partnership?; and how do we guarantee the maintenance and renewal of the partnership over time?

The creation of IONs is often a goal that takes time and does not bring immediate economic gains (Sadovnikova, Pujari, & Mikhailitchenko, 2016). Likewise, costs with inter-organizational projects are more difficult to control and typically have higher costs than projects from a single company. Thus, companies that establish networks must take into account all risks associated with the medium / long term return on investment. Contrary to these authors, Ring and Van de Ven (1994) and Paturel (2017) claim that strategic partnerships help deal with intense competition, reduce or minimize costs, maximize revenue, expand into new markets, and acquire technology and know-how.

Inter-organizational cooperation and the establishment of strategic partnerships are seen as strategic paths for the survival and development of companies (Paturel, 2011). According to Russo and Cesarani (2017), strategic partnerships are developed through three phases (design, operationalization and evaluation) and the success of each phase depends on several KSFs.

The first stage, the design of the partnership, depends on the interest of two or more actors in establishing a partnership. Their motives and benefits are taken into account, and the selection of partners and the form of partnership are crucial at this stage (Russo & Cesarani, 2017).

The second phase is the operationalization of the partnership. It is at this stage that all the theory discussed at the design stage is put into practice in economic terms (Russo & Cesarani, 2017). This phase becomes crucial to the survival of the partnership as the interactions between partners are very high and the risk of conflict increases (Das & Teng, 2003). According to Russo and Cesarani (2017), the main KSFs involved in this phase are coordination, trust, commitment, control, communication and conflict.

Finally, the evaluation phase, in which partners visualize the benefits brought by the partnership and it is where they decide whether the partnership has continuity and is developed or terminated. The partnership is evaluated according to some metrics, namely in economic, strategic, operational, learning and relational terms (Tjemkes, Vos, & Burgers, 2012).

Upstream and Downstream Partnerships

In order for a company to be able to organize and establish its partnerships, a detailed analysis of its value chain is crucial in order to obtain the best results for all its stakeholders.

Some partnerships can either be established upstream or downstream in the value chain, although these relationships are much more complex (Silva & Moreira, 2017; 2018; Ribau et al., 2019).

In order to establish upstream and downstream partnerships, the company needs to assume the role of intermediary or third party, mediating connections between two or more actors (Spiro, Acton, & Butts, 2013). In this way, the company can serve as a link between two partners that complement their interests, skills or resources and may also add value to the offer made available by the upstream partner to the downstream partner (Stuart, Ozdemir, & Ding, 2007).

According to Dutta and Hora (2017), upstream partnerships show a positive impact on the success of the invention but not on commercialization. However, the combination of upstream and downstream partnerships has a positive impact on the success of both the invention and the commercialization of a product or service. As firms mature, downstream partnerships tend to fade away (Stuart, Ozdemir, & Ding, 2007), as with the knowledge acquired the intermediary takes on the role of final seller. However, it is a general opinion in the literature that collaboration with both upstream and downstream partners is important (Brettel & Cleven, 2011; Theyel, 2012; Silva & Moreira, 2017; Ribau et al., 2019).

Upstream partnerships are often composed of B2B IONs, outsourcing contracts, acquisition of patents but may also involve universities and consultancies. There is an ambiguity in the literature regarding these partnerships (Stuart et al., 2007). Although some authors argue that upstream partnerships are developed more frequently between large firms, others argue that SMEs, because of their flexibility and adaptability to the market, develop these partnerships in the same way as large companies, although with less investment, capacity and R&D (Silva & Moreira, 2017, 2018).

Downstream partnerships are addressed in some studies because of the importance of customers in spreading the innovation created upstream (Lee, Park, Yoon, & Park, 2010). In these partnerships, when the main objective is to produce customized goods or services, the relationships between clients and SMEs are more frequent than between clients and large companies (Silva & Moreira, 2017). However, large companies are able to reach customers faster due to their greater specialization (Tether, 2002; Silva & Moreira, 2018).

Choice of Partners

Choosing the right partnerships means finding the desirable combinations of resources, goals, and strategies (Das & Teng, 2003). When the partner is selected, organizations have to take into account three main criteria: complementarity; congruence and compatibility between them and the to-be partner (Russo & Cesarani, 2017).

There must be a reason for embracing partnerships. Pennington-Gray, Cahayanto, Schroeder, and Kesper (2014) and Jiang and Ritchie (2017) suggest three theories that identify the reasons for establishing a partnership, namely in the tourism sector: resource-based theory, relationship-based theory, and policy-based theory.

As its name implies, a resource-based partnership focuses mainly on the efforts established between partner organizations based on mutual trust for the use of available resources, as there is awareness that the resources are scarce (Pennington-Gray et al., 2014). It is therefore essential that resource sharing is considered as the foundation of the establishment of partnerships (Nyaga, Whipple, & Lynch, 2010). These resources include financial support, collaborative capital, information sharing, knowledge and capacities (Jiang & Ritchie, 2017).

Relationship-based partnerships are based on mutual dependence and interest-sharing, which implies that partners work together to solve similar problems (Pennington-Gray et al., 2014). Normally, organizations with broader networks and past positive experiences are usually more predisposed to establish formal partnerships with other organizations (Guo & Acar, 2005).

Policy-based partnerships are commonly used to exploit the power to control resources that may affect and influence the success of establishing a particular partnership (Pennington-Gray et al., 2014), which is particularly interesting in the tourism sector (Jiang & Ritchie, 2017).

Once the three theories explaining the reasons for the establishment of the partnerships have been analyzed, it is essential to understand how the partners' choice can be carried out.

As proposed by De Boer, Labro, and Morlacchi (2001), with regard to the complexity and importance of purchasing decisions, the choice of suppliers also represents a huge complexity. Choosing a good supplier is primarily aimed at reducing risk and maximizing the value created for the end consumer. As such, suppliers must be able to meet the requirements imposed by the company and must be willing to engage in continuous improvement processes. Compatibility and congruence between partners and suppliers are an essential factor that determines the behavior, strategy and structure of the partnership (Resende et al., 2017).

In this way, it is important for companies, when choosing suppliers, to evaluate only those who have a good chance of qualifying to provide a service of quality and excellence, thus eliminating those who have no interest. After carefully selecting the partners, it is important to take into account some aspects that are presented in Table 1.

Definition of Objectives

As previously noted, setting objectives for building a partnership is essential. All partners need to have well defined and outlined the goals they want to achieve together for building the partnership.

Tsupari et al. (2001) claim that the following ones are the most important objectives for the construction of partnerships: reduction of costs; use of the most efficient capacity; use of more efficient production processes; increasing competitiveness by increasing R&D know-how; more efficient use of

Table 1. Relevant aspects for the creation of a partnership

Themes	Description
Objectives	What is intended to achieve. In what way and in what terms can partners evolve if goals are achieved.
Roles and responsibility	In some cases the responsibilities will be shared by the partners. Roles may be perfectly identified or discrete.
Contribution	Whenever possible, the partners' contribution should be quantified.
Levels of risk	Acceptable levels of risk for each partner. The level of risk must be predictable and measurable so that it can be understood whether the rewards outweigh the inherent risks.
Participation criteria	In the phase of entry of new actors in the partnership, current actors should discuss how the new ones should be selected and in what number.
Confidentiality	Definition of the level of confidentiality or promotion that should be chosen for the partnership.
Product / service issues and presentation	The choice of the type and name of the product or package to be developed and the design process to follow.
Marketing plan	The target markets, the most relevant marketing activities, the associated budgets.
Property	If they exist.
Decision-making	What structure to implement to facilitate decision making.
Management	The structure can range from an organization based on volunteering, to the use of a current staff for a collaboration of a specific duration, with the collaboration of a group of specialists.
Funds and financing	Identify the funding sources, membership and funding levels of each member and the division of payments.
Schedule	Presentation of the key activities on time.
Specific logistics for partnerships	Meetings, communication and decision-making processes must be structured in advance and the form of operation and access must beclear.
Closing	It is necessary to establish exit clauses or closures, penalties for unforeseen withdrawals, ways to return the resources provided. The agreement should also predict the replacement of new and different partners.
Evaluation	Presentation of the quantitative and qualitative measures to determine whether or not the objectives have been achieved.

Source: WTO (2003, p.13)

material and stock flows; enhanced competitiveness by concentrating resources more efficiently; and enhanced process reliability.

It should be noted that some of these objectives are mainly focused on the production of goods and not so much on services; however they are easily converted to the services sector. Once again, two broad categories can be found in these objectives: enhanced competitiveness, taking into account cost minimization and increased know-how; and increasing partner reliability by increasing flexibility.

Once the objectives are outlined and defined, it becomes crucial for the partner companies to achieve them. Although the outputs created by the partnerships are difficult to measure, Tsupari et al. (2001) list some factors that may serve as an evaluation of the stipulated objectives, namely: sales volume; margin; expenses; and profits.

While corporate culture is increasingly being driven to openness and transparency, many of these "gauges" are still seen as difficult to share by companies as they represent their most sensitive indicators. However, when there is the will to establish a partnership and create goals together, it is important to realize if the objectives and the creation of trust among partners have been achieved.

For Tsupari et al. (2001), the objectives that have been defined by the companies represent the best way to measure their achievement, and if the objectives are achieved through: enhanced competitiveness, minimizing costs; increased sales through new business and extension of the portfolio of products (or services); and increased partner trust by increasing flexibility.

Key Success Factors

It is essential that IONs are composed of strategic partnerships, as companies can achieve goals that alone would not be able to. These objectives, once defined by the partners, need to go through the control phase, where it will be necessary to identify and structure the KSFs (Resende et al., 2017). Although there are some ambiguities regarding the definition of KSF, most authors consider that they represent a significant way of influencing the position and competitive performance of an organization (Colauto et al., 2004).

According to Teixeira (2011, p.75), "*critical success factors are those resources, capacities and attributes that, in a given industry, companies must possess in order to achieve success*." For Colauto et al. (2004), managers should rank them as they provide the foundation for the development of the strategic plan. Resende et al. (2017), through a more networked approach, divides the sources of KSFs into: systemic factors; sectoral factors; relational factors; and internal factors. Complementarily, Moreira and Karachun (2014), when analyzing 461 articles, concluded that the transfer and management of knowledge are the most important factors influencing inter-organizational cooperation.

Augustyn and Knowles (2000) state the following KSFs, based on the specific nature of the tourism sector:

- Preparation of experts (partnership should be formally established in accordance with legal provisions);
- Well-defined objectives (the partnership must have long-term objectives based on extensive and forward-looking research, always respecting the identity of each organization);
- Partnership development framework (partnership need be based on reciprocity);
- Effective and efficient actions (both economic and social indicators need be taken into account for the success of the partnership);
- Sustainable nature of the partnership (constant feedbacks and redefinition of objectives are required).

As we can see, there are several perspectives on KSFs within partnerships. However, one can highlight the following ones: common established objectives; long-term perspective; trust and cultural closeness among partners. Also, the formality of the agreements is one of the KSFs highlighted by several authors. Partnership agreements should be simple and follow certain legal provisions that generate formal links between partners (Augustyn & Knowles, 2000). If partnerships are informally established, they must be based on a high level of trust (Gundlach & Murphy, 1993).

The life cycle of each partnership is also important. The longer the life cycle of the partnership, the greater its complexity, which means that it needs to be based on more formal grounds. Similarly, smaller organizations can establish informal partnerships more easily than large ones (Gundlach & Murphy, 1993).

Although there is no single formula to guarantee the success of the partnerships, the WTO (2001) identified the following KSFs behind successful partnerships:

Table 2. Characteristics related to the set-up of the partnership

Position
• Recognition • Commitment
Motivations and interests
• Clear definition of objectives • Defining the needs of each partner • Clear perception of the benefits (individual and mutual) • Elaboration of formal and written agreement with division of tasks and roles
Leadership
• Awareness and visibility in the market of one of the partners • Coordination of partnership • Selection of key stakeholders
Resources
• Human, financial and technological resources • Financing (defined and quantified) • Market research knowledge
Common vision
• Collective action • Long-term availability • Interdependence • Awareness of risk and risk sharing perspective

- A balanced structure, with the attribution of clear roles and responsibilities by all members;
- Sharing leadership between the two sectors with well-defined and shared objectives, with realistic expectations and the identification of benefits for both parties;
- A flexible approach by the partners, together with a willingness to understand each other's needs and contribute to resource sharing;
- Awareness among all partners that the development of tourism has to be sustained both economically, socially and environmentally;
- A long-term commitment that combines strategic vision and planning with concrete, short-term goals and measurable initiatives;
- Periodic assessment of the effectiveness and performance of each partner's role;
- Correct and effective communication between partners and with all stakeholders.

Although there are many KSFs, several authors are unanimous stating the following ones (Kanter, 1990; Child, Faulkner, & Tallman, 1998; Frisby, Thibault, & Kikulis, 2004): degree of trust and relationship building; management of the various partners values; strategic overview; networking; negotiation; effective inter-organizational communication; leadership and collaboration; conflict management; and flexibility.

In summary, one can argue that KSFs can be distributed in two phases of the life cycle of the partnerships. The set-up of the partnership, as shown in Table 2 and the maintenance of the partnership, as shown in Table 3.

Table 3. Characteristics related to the maintenance of the partnership

Normative principles
• Clear definition and presentation of objectives • Clear and objective presentation of benefits • Clear division and distribution of roles and responsibilities • Establishment of rules • Formalization of relations • Clarity of agreements and projects • Recognition of interdependencies • Effective and weighted survey of resources needed to maintain partnership • Exploiting the experiences of other cooperation and partnership projects in order to learn and overcome obstacles more quickly and effectively
Attitude of the members
• Solid foundation of trust • Perseverance • Consensus • Transparency and Integrity • Common vision • Commitment and enthusiasm • Great sense of commitment • Honesty and openness • Willingness to share knowledge and experiences • Change of mentalities that allows to see the competitors as allies
Human resource management
• Specialized employees • Formation • Consultants • Learning centers
Global management
• Adequate organizational and management structure • Frequent communication • Stable source of funds • Properly structured, actual, effective, documented and distributed planning • Definition of a network • Leverage of existing networks • Information sharing • Participatory decision-making • Flexibility • Acquisition of skills to overcome political issues external to the partnership • Regular meetings
Evaluation and monitoring
• Implementation of permanent evaluation and monitoring mechanisms • Assessment of partnership impacts • Assessment of the degree of satisfaction of the elements of the partnership • Assessment of the benefits of the partnership for each of the partners to ensure the fulfillment of the expectations • Assessment of the visibility and reputation of the partnership • Publication of a periodic report highlighting the results of the projects developed by the partnership • Continuous assessment to verify achievement of objectives • Development of flexibility and adaptability techniques

RESEARCH METHODOLOGY - CASE STUDY

This chapter involves qualitative analysis, based on the analysis of upstream and downstream IONs of a firm of the tourism industry. The case study is the ideal methodology when a holistic and in-depth research is needed. According to Yin (1994), the case study method makes an in-depth investigation possible and is relevant when the study covers a real environment in which a given action occurs. Exploratory case studies are sometimes considered as an introduction to social research. The explanatory case studies can be used to make causal investigations and the descriptive case studies require a descriptive theory to be developed before starting the project. The explanatory research aims to identify the factors that contribute to the occurrence of the phenomena or variables that affect the process (Raupp & Beuren, 2003). In this specific case, the establishment of a network was analyzed as the factors that led to its success in the short term and the factors that limited and prevented its continuation in the long term. Individual case studies can be used to confirm or challenge a theory or to represent a single or extreme case (Yin, 1994). In this paper, an unique case is presented within a company with the objective of, according to existing literature, to understand the factors that inhibited the pursuit of the ION. The case study methodology used an exploratory research method with an inductive approach, taking into account the relatively unfamiliar grounds of analyzing IONs. This approach was considered to be the most appropriate for studies that are at the same time explanatory and exploratory (that deal with the ‘why’ and ‘how’), and most appropriate for uncovering relational aspects which develop over time (Yin, 2008), namely addressing interactions among the upstream and downstream partners that inhibit the pursuit of an ION.

This study adopts an Action Research (AR) methodology as this chapter was based on an internship that took place during the master dissertation preparation and involved the participation of one of the researchers on the firm during a period of six months (Coughlan & Coghlan 2002). The participation in the internship allowed that all relevant data could be easily accessed, but also to assess the project partners needs and preferences unambiguous (Oral 2012). AR is based on various assumptions (Coughlan & Coghlan 2002): it involves an empirical approach to study the resolution of a specific problem together with the actors who experience the problem directly; it implies that the researcher participates in the research process, and is deeply involved with other members of the target company; it seeks to simultaneously build empirical knowledge and improve results of the target company; and it is both a sequence of events and an approach to problem solving.

Secondary data from upstream and downstream organizations were collected (different documents of the firm such as catalogues, flyers, public sources, etc.). Then, to complement information face-to-face interviews took place with the head of the firm where the project took place in order to understand the handling and evolution of the inter-organizational relationships with suppliers and customer.

The different sources are important for triangulation, in order to ensure the validation and reliability of data (Andersen & Skaates, 2004). This allowed us to study managerial actions regarding supplier and customer involvement in NPD activities. Such a research method matches our goal of studying inter-organizational relationships and their main inhibiting factors (Pettigrew, 1992).

An in-depth and semi-structured interview was also conducted. The interview began by addressing the design, implementation and evaluation of the relationships. The interview script sought to explore the types of partners, their roles, actions, resources, how and what were the control mechanisms and the main results in each phase. The internship helped in the triangulation of the information. The researcher maintained a passive and unobtrusive presence, so as not to interfere with ongoing events and activities.

Most of the data and conclusions drawn were achieved through the presence in the company where the six-month internship allowed experiencing facts and partnerships through daily presence and the implementation of various tasks, at both the level of the company's partnerships and the level of management and intervention in projects of internationalization of the company. This internship underpinned the implementation of as action research perspective that supported the researcher to get involved and solve immediate problems to deal with partnership formation.

CASE STUDY AND RESULTS

Portugal has witnessed a tourist boom in recent years. Its economy has felt the repercussions of this phenomenon and its demand as tourism destination has increased among national and foreign tourists. The creation of hostels, the opening of new restaurants, the appearance of hop-on hop-off buses and tuk-tuk are some examples of development due to the growth of tourism. According to data provided by the Bank of Portugal in August 2017, the "travel and tourism" item of the Balance of Payments reached 8,8 billion euros in 2016, growing 12.7% compared to growth of 10.8% in 2015 (National Institute of Statistics, 2017).

ALPHA, founded in 2016, is a travel agency and tourist animation firm that seeks to offer customized holiday and visitation programs, favoring, at an early stage, the North/Centro region of Portugal, delimited between Porto and Coimbra, the coast and Serra da Estrela, Douro River and Mondego River. ALPHA's programs focus on: nature tourism; the patrimony; health and wellness; scientific, gastronomic, enological, recreational, rural and religious tourism; sports and adventure; business tourism; and vocational training.

In the words of the Manager, ALPHA seeks to "*value and disseminate the Portuguese reality with a focus on tourism. On the other hand, it also had as its objective, to intervene socially giving opportunity to the various actors who work in the territory*. "

One of ALPHA's goals is local development. Although they have multi-day programs, it is mandatory that one day is spent only in a region, where the experiences are in that territory, the guide is of that territory, the hotel and restaurant are from that place and at the end of the day there is always a taste test where the customer can sample the regional flavors and contribute to the local economy.

Entrepreneurs see tourism growth as a way to create new businesses. "Mass tourism" gain ground in large urban centers, such as Porto and Lisbon. Tourists of this type of segment try to visit as many attractions as possible in a short time.

Avoiding mass tourism, ALPHA has distinguished itself by giving priority to a specific type tourism employing endless Portuguese natural resources, many yet to be unraveled. They work on sustainable tourism and especially in areas with low human impact.

Importance of Partnerships and Selection of Partners

Partnerships are one of the most important, if not the most important, factors in running the entire business, since all of ALPHA's programs are performed jointly with other entities.

As mentioned, through established partnerships with different stakeholders, ALPHA brings together the various activities of each one of its partners in a single program, thus giving the client the possibility to have a wider range of choice and also giving their partner the opportunity to disseminate their activities as part of a single tourist program ALPHA provides.

ALPHA saw in the IONS an opportunity to distinguish itself in the market, since at the time when it was established, companies acted very much for themselves and even nowadays this thinking still prevails. So, taking this opportunity ALPHA created a solution that was not common in the market.

After having a database with potential suppliers, meetings were held with them to get to know each other, to perceive the “modus operandi” of each of them in order to analyze if they could work together. If both parties saw an interest in a potential partnership, ALPHA would proceed with a concept test. For example, if a restaurant wanted to work with ALPHA and ALPHA saw interest in this restaurant, it would be assessed during a visit by a group of tourists in which the several aspects would be tested, namely: service quality, quality of meals, service environment, among others.

After the evaluation of the concept test and if there is a mutual interest, a protocol would be signed between the two parties. This phase becomes very important, because as referred in the literature review, it is unanimous among several authors that the partners’ choice should be made in a careful way. ALPHA should choose partners who have the same objectives, that is, provide a service of quality.

Once the upstream partnerships had been established, it was important for ALPHA to also establish downstream partnerships would affect the sale of tour packages.

As far as downstream partnerships are concerned, ALPHA depicted internationalization as the main way for the firm to take off. Although the national public is not neglected, especially at corporate level, foreign tourists are ALPHA’s main target audience.

It is therefore important to distinguish the two targets in ALPHA’s downstream partnerships, since they have different characteristics. Although the national public is not ALPHA’s main priority, it represents the only sales volume so far.

These national partnerships represent a major investment in the search for information, especially online and in the corporate, financial and academic environment. These partnerships are sought after to be implemented with end clients.

Downstream partnerships represent priority partnerships, as ALPHA sees in the international public its source of viability. ALPHA has a particularity that many Portuguese travel agencies do not have: it does not have international-oriented programs. On the contrary, ALPHA aims to attract foreign tourists to get to know Portugal, contributing directly to the growth of tourism and the national economy. This concept is known as inward or reverse internationalization.

ALPHA, through a market study, defined its “priority countries” or of “first stage”. It carried out a survey in order to perceive which countries generate most of the visits to the Centro/North region of Portugal, namely, the rural areas. As a result, the top 10 countries were: France, Spain, Germany, the Netherlands, Brazil, Belgium, United Kingdom, USA, Italy, and Switzerland.

As a result, it was concluded that there are two main strategic targets for the internationalization of the company: on one hand, to establish partnerships with foreign travel agencies or tour operators that see ALPHA as a complement to their offer – to present ALPHA’s programs to their foreign customers – and, on the other hand, to establish contact with the final customers themselves – which can be achieved mainly by the digital campaign carried out by the company or by word of mouth.

Operational Implementation and Phases

This chapter presents the establishment and implementation of an ION that was created to provide a specific service to a particular customer, called BETA, and the partnerships established by ALPHA. Through this analysis, it is possible to perceive the life cycle (namely its design, operationalization and evaluation) of this network and its results and continuity.

In 2017, ALPHA received an order of an offsite meeting program for BETA. As mentioned earlier, since ALPHA did not have the necessary skills and resources to develop it alone, it had to make use of the contacts made so far in order to establish a network of partnerships that would lead to the design of a program. Table 4 lists the partnerships ALPHA has established and the most important factors.

Based on the program commissioned, which concerned to an off-site meeting activity, which sought to encourage BETA's employees to get to know each other better and to work as a team, out of doors. The partners listed in Table 4 were those who had an offer most suited to ALPHA's objectives.

The shown in Table 4, only one actor, the City Council, formalized the partnership, as most of upstream partners did not sign any protocol stablishing informal partnerships with ALPHA. This aspect leads us to perceive what has been analyzed in the literature review regarding the fact that many partners do not take into account the formal insertion into the network with the due commitment and investment.

Although ALPHA's main objective was to establish a long-term relationship with the different actors in this network, most partners did not sign this protocol agreement although they have informally established the partnership with a view to signing the protocol in the medium-term. As shown in the literature review, in relation to the KSFs of the partnerships, the existence of an entity that controls the partnership is important so that the entire program runs as stipulated. In the absence of this ION, ALPHA tried to "control" it through a protocol where all the obligations and rights of both upstream and downstream partners were stipulated in writing. This would make the ION and partnerships more transparent, credible and flexible for other future service deliverables.

At this stage of development and operationalization of the program, the partners undertake to comply with the conditions and responsibilities that were agreed at the design stage of the program. Although ALPHA's role in bringing partners together to develop a package and being the first contact with the client, the various actors acted independently during the service, as shown in Table 5.

With the end of the program provided to BETA, it becomes important to manage all partnerships in order to ensure a continuity of relations. However, two situations were found. Although there were no other joint works, it should be noted that all the upstream partnerships, although not all with the protocol signed, have maintained dialogue and willingness to continue partnering with ALPHA. However, with the partnership established downstream with BETA, although with a very positive feedback, there was a cut in the relationship and the lack of any subsequent dialogue to the provision of the program despite attempts by ALPHA.

This can be explained by the fact that the expectations of different partners are different. While upstream partnerships provide a complementary resource and have the clear benefit of partnership, downstream partnerships are relying on a service provision that has a certain transaction cost, as expected.

As shown in Table 6, in comparison to what is stated in Tables 4 and 5, the objectives are quite different. It is expected that this network will be maintained in the long term, both upstream and downstream. However, the results show that only one partner upstream signed the protocol, all others only had a partial contact with ALPHA, thus causing factors such as commitment, investment and trust in the relationship to be impaired. In relation to the downstream partnership this had a completely unexpected outcome.

Table 4. Main aspects in the design of the networked program

Partner	Role	Actions	Resources	Control	Objectives	Results
Museum – City Council	Facilitator / Legal authority	Authorization, assignment and preparation of the auditorium	Knowledge of the territory and infrastructures; Experience in hosting; Local and legal authority	Protocol	Signing of cooperation protocol	Partnership formally established with protocol signature
Restaurant	Meal Provider	Presentation of menu	Local service; Human Resources	Protocol	Signing of cooperation protocol	Informal partnership without signature of protocol
Animation Company of the region	Activity Provider	Present and prepare play/game activities	Equipment for activities; Human Resources	Protocol	Signing of cooperation protocol	Informal partnership without signature of protocol
Producer of typical Cakes	Product Provider	Present products to be made	Equipment, logistics and products	Protocol	Signing of cooperation protocol	Informal partnership without signature of protocol
Transport company	Transporter	Facilitate rental	Human resources; Experience	Protocol	Signing of cooperation protocol	Partnership established through contract
BETA	Service receiver	Formally requesting service with insertion of ALPHA in the supplier framework; Payment of service	Human resources	Protocol	Signing of cooperation protocol	Partnership established with ALPHA as one of BETA's suppliers

Although there was a very positive feedback, both on the day of the program and on the satisfaction survey, and although it was demonstrated that there is a desire to doing this activity with ALPHA again, there was a loss of communication with BETA, leading to a breach of expectations regarding future services, as with the relationship of the remaining network partners.

The fact that network assessment mechanisms were not established could also have been a factor that influenced the continuation of this ION in the long term.

Although in economic terms the partners are able to quantify their profits, no mechanisms have been outlined for the measurement of strategic learning, operational and control outcomes.

In establishing these partnerships, ALPHA had as main objectives: (1) to expand the portfolio of services with complementary services and products; (2) to acquire know-how outside their competencies; (3) entering new markets and new sales channels; (4) to reduce program design time; (5) enhanced credibility; (6) enhanced added value to the service; and (7) to develop under-explored areas.

Through the interview conducted and the work developed in the company, one can conclude that the partnerships and the establishment of the ION were essential for ALPHA in order to add value to the service provided to the client. Since ALPHA only aggregates the services provided by the suppliers, an

Table 5. Main aspects in the development of the network program

Partner	Role	Actions	Resources	Control	Objectives	Results
Museum – City Council	Facilitator / Legal authority	Group reception and welcome message; Presentation of the territory	Knowledge of the territory and infrastructures; Experience in hosting; Local and legal authority	Protocol	Guarantee of information and infrastructures; Protocol implementation	Protocol implementation
Restaurant	Meal Provider	Logistics related to catering and meals	Local; Human Resources	Informal	Publicize the typical regional flavors of the region; Clients satisfaction	Meeting the requirements set out in the informal partnership
Animation company of the region	Activity Provider	Accompany the group; Prepare and provide recreational activities	Equipment for activities; Human Resources	Informal	Stimulate the business market; Image construction	Meeting the requirements set out in the informal partnership
Producer of typical cakes	Product Provider	Confection and present the sweets in a taste test	Equipment and logistics	Informal	Publicize the typical regional flavors of the region; Clients satisfaction	Meeting the requirements set out in the informal partnership
Transport company	Conveyor	Transportation of customers (round trip)	Qualified human resources; Experience	Contract	Ensure logistics and transportation	Implementation of the requirements established in the contract
BETA	Service receiver	Participation in the event	Human resources	Informal	Satisfaction	Satisfaction and willingness to repeat

exhaustive search by the right suppliers, in order to provide a top service quality, was necessary. Without this complementarity of the partners that were established, it would not be possible to present a tourist package to the clients.

DISCUSSION OF RESULTS AND RECOMMENDATIONS

Although the establishment of a long-term partnership is desirable for the success of any partnership, this is something quite complex as a result of the pace of constant change that one witnesses especially in the tourism sector.

Through the case study, one can see that some partnerships, namely upstream, have been successful, since there is continuity of the relationship. However, there are other partnerships, such as the one established downstream, which would have been expected to be long-term oriented, which did not hold out.

Taking into account the literature review, the interview with ALPHA CEO and the results of six months of internship in the company, it is possible to highlight the main factors that influence ION partnerships as shown in Table 7: facilitating factors; motivations; challenges and barriers; key success factors and inhibiting factors.

Table 6. Main aspects of the end, evaluation and next objectives of the partnership

Partner	Role	Actions	Resources	Control	Objectives	Results
Museum – City Council	Facilitator / Legal authority	Farewell message	Knowledge of the territory and infrastructures; Experience in hosting; Local and legal authority	Protocol	Guarantee of information and infrastructures based on the signed protocol	Continuity of partnership
Restaurant	Meal Provider	All the logistics related to the confection of the meals	Local; Human Resources	Informal	Signature of the cooperation protocol	Partial contact
Animation company of the region	Escort; Dynamic; Activity Provider	Prepare and arrange activities	Equipment for activities; Knowledge of the territory; Human Resources	Informal	Signature of the cooperation protocol	Partial contact
Producer of typical cakes	Product Provider	Making and presenting sweets	Equipment and logistics	Informal	Promotion of regional flavors of the region; Clients satisfaction	Partial contact
Transport company	Conveyor	Facilitate rental; Carry customers	Qualified human resources; Experience	Contract	Ensure logistics and transportation	Partial contact
BETA	Service receiver	Participation in other events	Human resources	Feedback through satisfaction survey	Provision of similar services the in following year	Total Contact Break

Once a real example of a program carried out by the ALPHA network was analyzed, in order to analyze its success and inhibiting factors, it is possible to claim that there are many KSFs and that they must be analyzed prior to the establishment of the partnership. Moreover, companies must outline a strategic plan in coordination with their partners where they define the KSFs in the design, operationalization and evaluation of the partnership in order to avoid misunderstandings that lead to the termination of the partnerships.

CONCLUSION

In recent years there has been an increase in the number of partnerships and in IONs, in order to gain competitive advantage. These partnerships and IONs are established to gain an advantage over competitors, to enter new markets and gain access to the resources, capabilities, skills and know-how that the companies alone could not attain. Although the establishment of strategic partnerships is increasingly used by companies, there are still several cases of success in the short term but without continuity in the long term. This study contributes to identify KSFs for partnerships and to exemplify how they are used or not used throughout the life cycle of a particular network. As discussed throughout the case study, the management of these factors is crucial to the success of a partnership. They must therefore be taken

Table 7. Factors influencing the establishment of network partnerships

Facilitating factors
• Corporate nature; • Network of contacts; • Positive relationships;
Motivations
• Financial support; • Sharing information, knowledge and skills; • Improve networking and relationships; • Achieve results through partnership;
Challenges and Barriers
• Competition between partners; • Poor relationship and poor planning; • Life cycle (duration) of the partnership; • Trust; • Different organizational cultures; • Common objectives; • Coordination, planning and evaluation;
Success factors
• Trust and commitment at the beginning of the partnership; • Mutual strategic interests; • Strong know-how; • Sense of opportunity and innovation; • New, different and competitive services; • Human Resources;
Preventing factors
• Low commitment to the relationship; • Lack of experience and knowledge; • Personalities and attitudes; • Lack of communication; • Coordination and planning; • Confidence and long-term commitment.

Source: own design

into account before choosing the partners so that companies are aware of and prepared for all the risks, difficulties and opportunities that the creation of an ION entails.

This study has some management implications on the decisions and actions taken during the ION life cycle. When a company is predisposed to manage an ION it must have several critical factors in attention. Both before and during network design, partners need to maintain a high level of commitment to the partnership in order to develop high levels of trust. If one fails to achieve this, it is likely that partnerships fail. As a result of the lack of experience, often organizations only visualize the goals and benefits they can achieve for themselves. This is where the zeal of partners is crucial. The selection of partners must be carefully taken care of so that different objectives or different levels of quality in the provision of the service do not arise among the partners.

During the operationalization of the network, the development of the relationship must be taken into account, aspects such as coordination, communication, commitment, conflict resolution and, above all, trust must be worked.

If the network can achieve these aspects, information sharing will be facilitated.

Finally, in the evaluation of the network, if it has been beneficial for all partners, subsequent objectives need to be stipulated. To assess if the network was successful a series of procedures and evaluations should be put into practice, such as the economic, social, strategic and operational impact and know-how acquired.

Although the inclusion of multiple actors in a network is a very complex process, as a result of to the cultural, identity, political and management differences between them, commitment and trust are essential for the success of the partnership. Only when there is an investment from all parties and the trust between them leads to a long-term relationship, will the success of the partnership be achieved.

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KEY TERMS AND DEFINITIONS

Case Study: It is a research method qualitative normally used in social sciences. It seeks to interpret a reality through a particular perspective. It is normally used to answer questions like "how" and "why." It is commonly used to address constructivist research processes.

Contextual Conditions: They normally characterize a country, a region, or a market, based on a set of political, social, economic, and cultural dimensions. These dimensions are useful to depict how those contextual conditions differ across countries, regions, or markets.

Internationalization: It is the process of increasing involvement of enterprises in international markets. It involves a strategy carried out by firms that decide to compete in foreign markets. It involves cross-border transactions of goods, services, or resources between two or more firms or organizations that belong to two different countries.

Network: It is a term used to refer to any pattern of interrelationships among actors (individuals or organizations) in which each actor is linked or connected to every other actor (individual or organization), directly or indirectly. In this chapter, the term network is used to refer to interorganizational networks (IONs).

Partnership: It is a form of business in which two or more individuals share ownership and the responsibility for managing a business organization. The income, profits and losses that this partnership generates is shared according to the terms of agreement. In absence of such agreement, the partnership is assumed to exist until the participants agree to share the associated risks and rewards proportionately.

Chapter 6
Tourist Shopping and Omnichanneling

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ABSTRACT

In recent years new technologies have increased access to information and, as a result, many channels can be used in an integrated and combined way. Omnichannel strategies have emerged in shopping which allow consumers to have integrative and holistic experiences. This trend, in addition to its influence on the general consumer, has implications for tourists who can take advantage of different channels in their costumer journeys through adopting omnichannel behaviors. Due to the importance of omnichanneling and tourist shopping, and the fact that no studies examine them in conjunction, this theoretical chapter aims to launch this research line; future research lines are presented to improve the retail sector and tourists' shopping experiences.

INTRODUCTION

New technologies have changed so many aspects of our lives that it is hard to imagine being without them. The mobile phone, tablet, computer and other smart devices give us a sense of security and help us make good decisions in our daily lives. It is increasingly unusual to find someone who will take an initiative without first consulting one of these devices, which can be thought of as new extensions of

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ourselves. This is clearly seen in the field of shopping, where consumers take advantage of the wide variety of channels to obtain the maximum information possible, make the best decisions and share their experiences before, during and after buying products and services. In addition, at physical points of sale one sees the growth of new technological solutions (e.g., tablets, touchscreens, augmented reality, digital signals, quick response codes (QR), beacons and free Wi-Fi (Mosquera, Olarte-Pascual, Juaneda Ayensa, & Sierra Murillo, 2018)). These developments have led to the emergence of omnichannel consumers; omnichannel consumers use online (web-based) and offline channels (station-based) in an integrated manner, several at the same time, so they can apply the information they obtain in the best possible way (Rodríguez-Torrico, San José Cabezudo, & San-Martín, 2017; Yurova, Rippé, Weisfeld-Spolter, Sussan, & Arndt, 2017). On a global scale, omnichannelers access the Internet mostly through the mobile phone (52%), followed by computers (43%). Also on a global scale, the time spent searching for information with the mobile phone is 59% of the total and the use of mobile applications is at 80% (Ditrendia, 2018).

What, for some, simplifies and makes certain tasks easier, for others is an added complication. It has become practically impossible for vendors to control how consumers use the different channels available to them (Verhoef, Kannan, & Inman, 2015). This involves some rethinking and consequent reformulation of competitive strategies (Brynjolfsson, Hu, & Rahman, 2013).

A situation in which consumers use multiple channels to make their purchases is when in a touristic destination. This makes the tourist a potential omnichannel consumer. Tourists focus strongly on information searches given the high perceived risk created by their lack of destination knowledge (Coromina & Camprubí, 2016), the limited time they have available during their trips and the desire to make the best possible shopping decisions. This inclines them toward omnichanneling and, thus, worthy of study.

Understanding new trends of shopping behavior by tourists are increasingly important for countries, regions and local businesses as the purchases made by them contribute to a positive image and are a great source of income (Chang, Yang, & Yu, 2006; Jin, Moscardo, & Murphy, 2017). Shopping during tourist stays has gone from being an incidental activity to being one of the main travel motivations (Choi, Heo, & Law, 2016). The growing importance of tourist shopping for European destinations is evidenced by a total market growth of 125% in the sector in the last decade. In recent years European retailers' sales to tourists have seen an increase of 8% (Global Blue, 2017). Retail store purchases by tourists in other major destinations worldwide average between $50 and $200 per day (Ostelea, 2019).

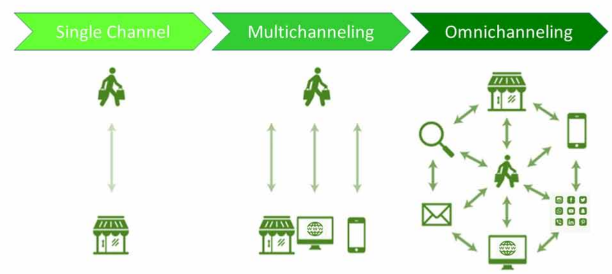
Although these two retail realities (omnichanneling and tourist shopping) are very important for the economy in general and for the sector in particular, there are no studies that analyze them in conjunction. This present work highlights the need to begin the empirical study of the role of omnichanneling in tourist shopping, with the aim of increasing our understanding of tourist behavior in this emerging scenario.

This chapter is organized as follows. Omnichanneling is discussed in section 2. Section 3 analyses tourist shopping and differentiates the two important concepts of this reality: shopping tourism and tourism shopping. Section 4 addresses in parallel the concepts of omnichanneling and purchases made by tourists. And section 5 presents the conclusions, implications and future research lines.

THE OMNICHANNEL PHENOMENON

The proliferation of channels available to consumers has changed the shopping environment (Brynjolfsson et al., 2013). Some years ago, consumers only had access to offline channels (i.e. stores and other physical resources provided by retailers), nowadays, new technologies allow consumers to interact,

Figure 1. From single channel to omnichanneling



inform themselves, compare and shop anywhere and at any time without having to be physically in the store (Melero, Sese, & Verhoef, 2016; Rodríguez-Torrico et al., 2017). These evolution in the number, type and access to channels has originated new trends in consumer behavior which are continually readapting. Another consequence of this evolution is the rapid conceptual change (Figure 6.1): what was considered just a few years ago to be multi-channeling is now omnichanneling. Multi-channeling involves a division between the physical and the online; in omnichanneling there is freedom of movement between the two types of channels (Melero et al., 2016). The shift from "multi" to "omni" is the result of a shift from "everything" or "universal" to "everything together", according to its etymology (Juaneda-Ayensa, Mosquera, & Murillo, 2016). Omnichanneling involves the synergy of the numerous available channels, both offline (i.e. brick and mortar stores, physical catalogs…) and online (i.e. Internet, web stores, mobile apps, social media…), used in full convergence and without barriers, so that the consumer can enjoy a complete and integrated shopping experience (Lazaris & Vrechopoulos, 2013; Mosquera, Olarte-Pascual, Juaneda Ayensa, & Sierra Murillo, 2018; Mosquera, Olarte Pascual, & Juaneda Ayensa, 2017; Rodríguez-Torrico et al., 2017; Verhoef et al., 2015).

In this new reality, omnichannel consumers have emerged who do not search in a single channel, but use several simultaneously. Unlike single channel consumer who develops the whole shopping process in a retail store, an omnichannel consumer might research a product on a mobile device, compare several brands on a computer and then purchase the product in a brick-and-mortar store. This new type of consumer wants to take advantage of the benefits offered by each channel to search, compare products, seek advice and look for lower prices (Juaneda-Ayensa et al., 2016; Yurova et al., 2017). Therefore, they expect the channels to be consistent, uniform, offer an integrated service and allow barrierless interchannel mobility, whether between the physical store, the online medium or the mobile. However, very few vendors can offer such an experience, as the vast majority are still anchored in the separation between the online and the physical, and manage them separately (Piotrowicz & Cuthbertson, 2014).

Undoubtedly, this new reality is affecting competitive strategies and it is a challenge for vendors to reach this new type of very demanding consumer (Verhoef et al., 2015; Yurova et al., 2017). The old barriers, such as geography and consumer ignorance, are beginning to break down, due to the advent of these new channels and the use to which they are being put. Besides, there are some problems raised by new technological trends like omnichanneling which must be overcome. Problems such as the relegation of vendors as information suppliers to the Internet, the dependence that new technologies could cause on users or the huge amount of information (certain or not) available are appearing (Crittenden, Peterson & Albaum, 2010). Consequently, the old approaches that businesses took to reach the consumer are no longer valid and research is necessary to provide better interconnected services and diminish the problems raised by this new reality (Brynjolfsson et al., 2013; Verhoef et al., 2015).

TOURIST SHOPPING

In recent years, the expansion and rapid growth of tourism has made it one of the world's largest economic activities (Zaidan, 2016). When the tourist travels, his/her time is limited and there are many available activities, so choosing well what to do with one's time and money is really important. Shopping is probably one of the easiest activities and good for experiencing local culture (Hsieh & Chang, 2006; Yüksel & Yüksel, 2007). For tourists, shopping is a recreational activity that, in addition to fulfilling the need for fun and relaxation, helps them escape their daily routine (Law & Au, 2000; Timothy, 2005; Tosun, Temizkan, Timothy, & Fyall, 2007). A good example of this is that shopping is increasingly scheduled into travel itineraries (Hsieh & Chang, 2006; Timothy & Butler, 1995). Logically, in addition to being an appealing activity for the tourist, it is also advantageous for local, regional and national economies as it creates a positive destination image, generates employment and is an important source of income: approximately one third of tourist spending is on shopping (Albayrak, Caber, & Çömen, 2016; Tosun et al., 2007).

The previous literature divides the study of tourist shopping into two categories (Jin et al., 2017; Lo & Qu, 2015), which cannot be confused: purchases as the main purpose of travel (shopping tourism) and shopping as an activity within tourism (tourism shopping) (Table 6.1). Shopping tourism is defined as a distinct tourist activity where shopping is the main objective of the trip (Choi, et al., 2016; Jin et al., 2017; Michalkó & Rátz, 2006; Rabbiosi, 2011; Timothy, 2005). In this form of tourism, the destination is evaluated by the quality of the shopping experience, so the tourists' level of satisfaction will be subject to whether the shops met their expectations (Jin et al., 2017; Michalkó, Irimiás, & Timothy, 2015). In tourism shopping purchases are recreational and unplanned; the tourists search for, select and buy goods to take home (Choi et al., 2016, Jin et al., 2017; Yu & Littrell, 2003).

OMNICHANNELING AND TOURIST PURCHASES

The importance of omnichanneling in tourism and travel has been highlighted (Verhoef et al., 2015); tourists use multiple channels in the shopping process, thus the path from the wish to purchase to the actual purchase is no longer linear (Mahrous & Hassan, 2017).

Individuals, when they are in the tourist role, will focus more on information searches in their purchases than they will when they are in other roles, given the high perceived risk caused by lack of knowledge of the destination (Coromina & Camprubí, 2016; Sirakaya & Woodside, 2005). This makes them omnichannel consumers, possessed of particular characteristics that require separate study (Carlson, O'Cass, & Ahrholdt, 2015; Mosquera, Juaneda Ayensa, Olarte Pascual, & Sierra Murillo, 2019). Certainly, the use of various channels has become a very important element of the tourist experience, as well as building loyalty to brands and shops (Lo & Qu, 2015; Mahrous & Hassan, 2017). Given the

Table 1. Shopping Tourism vs Tourism Shopping

Concept	Definition	Source
Shopping Tourism	A tour where the main purpose is purchasing products	Timothy and Butler (1995)
	Tourist activity of purchasing products at a destination.	Yu and Littrell (2003)
	Tour where shopping comprises over 50% of the financial outgoings, excluding accommodation and transport costs.	Michalko and Rátz (2006)
	"Shopping is the primary motivation for a trip, or the primary element in forging the touristic experience"	Timothy (2005, p. 71)
	A contemporary form of tourism fostered by individuals for whom purchasing goods outside of their usual environment is a determining factor in their decision to travel	UNWTO (2014)
	Entails people travelling explicitly to shop, or to destinations where shopping is recognized as one of the most significant attractions	Timothy (2014) and Tosun et al., (2007)
Tourism Shopping	Tourist expenditure on goods purchased	Heung and Qu (1998) and Law and Au (2000)
	Incidental shopping activity at the tourism destination	Timothy (2005)
	The purchase behaviors of tourists at their destinations	Chang et al. (2006)
	Shopping as a side or secondary activity during a trip	Rabbiosi (2011)
	A contemporary recreational activity that involves looking, touching, browsing and buying	Tosun et al. (2007); Murphy, Moscardo, Benckendorff & Pearce (2011)
	An activity in which tourists purchase goods, during their travels, to take home	Jin et al., 2017

Source: Compiled from literature review

interest that retailers have in persuading tourists to buy their goods, it is imperative that vendors provide a positive experience from the first contact.

The Internet has become the most used channel by tourists (Llodrà-Riera, Martínez-Ruiz, Jiménez-Zarco, & Izquierdo-Yusta, 2015). Through the Internet, all kinds of user can interact, create content, exchange experiences and make comments (Buhalis & Law, 2008; Llodrà-Riera et al., 2015). Tourists in this context are both producers and recipients of content (UNWTO, 2014). Focusing on shopping, tourists share their experiences in various ways, publicly voicing their opinions about the items they buy on their trips and the places they shop (Tosun et al., 2007).

As already indicated, consumer and tourist omnichanneling is a new challenge for businesses (Piotrowicz & Cuthbertson, 2014), as it is practically impossible for them to control the use that their customers make of technology in their purchases (Juaneda-Ayensa et al., 2016; Verhoef et al., 2015). However, knowing of its existence and its impact on tourist purchases is the first step toward exerting control over this new trend.

Some studies analyze the role of omnichanneling in intention to buy tourism products and services, the satisfaction derived from the activity (Mahrous & Hassan, 2017; Park & Park, 2016) and how tourists obtain information when traveling (Coromina & Camprubí, 2016; Dey & Sarma, 2010; Llodrà-Riera et al., 2015). It has been observed that these studies analyze the use of different information channels and omnichanneling in tourism from a general perspective, or in specific fields, such as transport, accommodation or catering, but with no focus on shopping in stores at destinations.

Although in academia there is a research gap in this area, its importance has been recognized in the business world. In the Fitur (International Tourism Fair, Madrid, Spain) there is a section dedicated to shopping tourism (Fitur Shopping) which helps tourism-orientated retailers increase their reputation and competitiveness. It has been highlighted on various occasions that omnichanneling is a fundamental element in the modern shopping process, and it is even more important in tourism. It allows tourists to make the best decisions and improve their shopping experience. In addition, shops can maintain a relationship with the tourists after they have returned home; these tourists may continue to buy from the shops online and, above all, act as reviewers and provide feedback using their own channels (Digital, 2018).

On the other hand, there are many applications and channels that allow tourists to prepare and plan their purchases online, before reaching their destination. This is considered part of the trip and provides tourists with information about shops, suggestions on what to buy and where, and recommendations for tours.

Another technology used to promote tourist shopping are beacons, which send to tourists' mobile phones data on nearby businesses and shopping information. This technology is being used in cities such as Las Palmas de Gran Canaria (Spain), which has beacons in its main tourist areas. Companies and shops must take into account this type of mobile phone application, as users increasingly demand more products and tourist services for their mobile devices, since this is their main means of obtaining information (Digital, 2018; Orange, 2016).

Given its novelty, few studies analyze omnichanneling in tourism and very few focus on tourist shopping and omnichannel behaviors. Therefore, there is a clear need to study the influence of omnichanneling in this area as the digital era has remodeled the choices, participation and behavior of tourists in shopping (Carlson et al., 2015; Jin et al., 2017).

CONCLUSIONS, IMPLICATIONS AND FUTURE LINES OF RESEARCH

For many tourists the time they spend shopping is an important element that shapes their travel experience, tourists look for shopping places that allow them buy items to take home (Law & Au, 2000; Lloyd, Yip, & Luk, 2011; Snepenger, Murphy, O'Connell, & Gregg, 2003). In parallel, omnichanneling has emerged as a strategy that harnesses the synergy of the available channels (online and offline) and breaks down traditional barriers in retailing, so that the consumer can have a comprehensive, integrated shopping experience (Brynjolfsson et al., 2013; Lazaris & Vrechopoulos, 2013). Now consumers can be in a store (offline channel) and, simultaneously, search for information in a smartphone app (online channel) about the products (Mosquera et al., 2018).

As omnichanneling is a growing consumer trend and is changing purchasing behavior, we need to study this new reality in all contexts. A situation where omnichanneling is particularly popular is when shopping at destinations, an increasingly common activity that makes a strong contribution to local economies. Given their high perceived risk associated with limited time and information, tourists use multiple channels to make almost all their purchasing decisions at their destinations, a further reason to study this phenomenon in particular. In spite of the fact that omnichanneling in the tourists shopping activity is obtaining an increasing importance in the business field (e.g. Fitur Shopping, specific technologies or mobile applications), no previous study addresses these two issues in conjunction, this is the first research to lay theoretical foundations and present future lines of research in this area.

Through this theoretical framework, the basis for an initial line of research to investigate a series of important topics is established, such as:

- The omnichanneling climate in tourist destinations and its effect on tourists,
- Classification and profiling of tourists according to their level of omnichanneling,
- Tourists' motivations to use different channels for purchases,
- Comparison of the characteristics of omnichannel tourists and non-omnichannel tourists,
- Possible effect of omnichanneling on intention to buy in destinations,
- Differences in omnichannel behavior between shopping tourists and tourists who shop,
- Interdependence, synergies and relationships between omnichannel tourists.

In addition, for destinations, local businesses and tourism companies, this field of study is of great importance due to its practical implications:

- Improvement in the adoption of omnichannel technologies by businesses and store employees,
- Incorporation of the omnichannel concept into strategies to attract tourists to retail shops,
- Seamless integration of channels and analysis of both online and offline information,
- Implementation of strategies in destinations that attract tourists with concerns about omnichanneling,
- Provision of a complete and attractive tourist shopping experience,
- Giving an image of shops and destinations that are technologically adapted to tourists' needs.

This chapter is a call for further studies into an issue that is considered important in the business world and that needs scientific research to help businesses and companies in their endeavors, improve the image of destinations and optimize the tourist's shopping experience.

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ADDITIONAL READING

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KEY TERMS AND DEFINITIONS

Channel: an element that facilitates communication and provides information to the user. It could be physical or virtual.

Omnichanneling: strategy that eliminates barriers between online and offline channels providing an integrated experience.

Omnichannel tourist: traveler that use online and offline channels seamless in the shopping journey in destinations.

Retail shops/stores: a place where consumers can buy goods. According to the type of store, products have specific and particular characteristics.

Shopping: the recreational activity of purchasing goods.

Shopping Tourism: a form of tourism in which shopping is the main objective of the trip.

Tourism Shopping: a secondary activity done by tourists in the destination that involves purchasing goods.

Chapter 7
Psychological Wellbeing as a Creative Resource for Businesses in the Tourism Industry:
A Multidisciplinary View

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ABSTRACT

This chapter probes the relevance of adopting a multidisciplinary view to better understand tourism. It focuses on psychology applied to this industry and particularly, psychological wellbeing as a key factor for the competitiveness of the field. Authors discuss the rise of the experience economy; aligning of psychology and tourism to further create knowledge; and wellbeing in tourism. A case study, The Tourist Wellbeing Project, gives hope for future multidisciplinary endeavors. Uniting efforts from different areas increases the chance to innovate and develop creative products, and psychological wellbeing has great potential as a nontangible product to improve the tourism experience.

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INTRODUCTION

Tourism is a field characterized by its diversity and its confluence with different sectors. Being a social, cultural and economic activity (Department of Economic and Social Affairs – Statistical Division [DESA], 2010) tourism faces enormous challenges that clearly require a multidisciplinary view to better understand its many facets. As it is stated by the European Travel Commission [ETC] (2016) the industry of travel and, therefore, tourism will be affected by people's current needs to live more meaningfully lives. Thus, businesses and industry stakeholders should and must adapt to this on-going change that is having a major impact in the world and, consequently in different fields such as in tourism. Migration, terrorism and many other threats have been shaping this industry. Furthermore, we are also seeing a shift in people's needs and desires, many are no longer interested only in going to a new place and just sit and relax. Many people look for something deeper, look for an experience they can connect with and that can enrich their lives. Thus, the need for the tourism industry to reinvent itself it's clear.

This need to reinvent should not be seen as a dreadful endeavor but as an opportunity to embark on a new adventure and maybe discover something new and exciting in the field. In concordance with DESA (2010), it is also the authors opinion that to start this process of reinvention, a multidisciplinary view is crucial, thus in this chapter, the authors aim to focus in Psychology as a new way to approach the tourism industry. Tourism is a social movement and an industry that services people away from home, therefore there is an obvious connection between the two since Psychology main study subjects are people. In this chapter, it will be emphasized the field of Positive Psychology in Tourism, and particularly the idea of psychological wellbeing and its potential for tourism businesses. Positive Psychology is the science that focuses on the study of wellbeing (Scorsolini-Comin, Fontaine, Koller, & Santos, 2013) and wellbeing is a concept that is getting greater attention each day, being acknowledged by some tourism businesses as an important piece that allows offering new experiences to tourists (Smith, & Diekmann, 2017).

Innovation and creativity in any industry, including tourism, can gain a lot from a multidisciplinary view and in this chapter, it is also an aim to address this challenge by presenting a case study, namely, the "Tourist Wellbeing Project" being developed in Madeira Island, Portugal, that combines the fields of (Positive) Psychology and Tourism. The project explores variables such as wellbeing, creativity, spirituality, and optimism, and its goal is to find a psychological profile of the tourist that visits Madeira and look for the activities that the Island has to offer that attract the tourist. The project is divided in three stages: a) the first one encompassed a deep literature review on the main variables of the study and the first drafts and validation of a psychometric measure of tourism wellbeing were made; b) the second phase, which is underway, is about data collection throughout a civil year, this means that at the moment researchers are retrieving data and proceeding to its categorization and introduction on the statistical software; c) the final stage is about data analysis and the development of an *app* that will allow future tourists to have a glimpse of their psychological profile and what activities suit them better so they can achieve higher wellbeing while in Madeira Island.

Thus, this chapter is structured as follows: a) a literature review as a background, b) an exploration about the link between Psychology and Tourism; c) a focus on the emerging idea of wellbeing in Tourism, with emphasis on some issues and concerns that stakeholders are facing, followed by d) a description of the Tourist Wellbeing Project as a way to improve destination competitiveness. The chapter ends with a reflection about solutions, recommendations and future research directions in the field.

Beyond exploring the above ideas, it is also an aim of this chapter to explore the importance of reinventing tourism products and particularly the potential of promoting 'wellbeing' as part of a destination 'experience'. Wellbeing is a creative resource that can be used to foster innovation in tourism and by presenting this concept and particularly the above-mentioned project it is the authors' goal to give a new understanding that businesses in the tourism industry have a lot to gain in terms of competitiveness from non-tangible resources such as psychological wellbeing.

BACKGROUND

Tourism is growing at a very fast rate and is expected to grow, for the next few years, by 4%, annually (Chen, King & Lee, 2018). As Tourism grows it brings with it new concerns, following the shifts in society, technologies development and even social and cultural phenomenon's. It is also a concern the future of tourism in itself. Thus, the idea of sustainable tourism comes as an important awareness for the present and future of tourism and of destinations. A sustainable tourism needs to acknowledge different factors. For example, a responsible use of the place natural resources, not forgetting the impact of this activity on things like waste management or water pollution. Also, the importance of protecting patrimony (both natural and cultural) but at the same time making sure of maintaining jobs created for tourism and measuring its impacts on local economy (Bratucu, Chitu & Demeter, 2015). As an intricated industry, research is a constant need and a reminder that the world is changing, people are changing, and industries need to take part in these changes.

Following these ideas, Busser and Shulga (2018) stated that today, there is a need for tourists to be involved both personally and actively in the development of their own experiences. By co-creating, memorable and unique experiences can be built, but also, they can mold future tourism experiences.

The growth of the experience economy is leading to a major shift in what people look for when choosing a destination. People are more concerned with the environment and sustainability, but despite this change, the key elements that are associated with vacations such as the sunny beach, sand, and sea are still looked for and will (forever) be. However, the idea of experience is already being introduced in mature destinations that are trying to find new product offers to avoid the decrease of interest (Almeida, Soares & Alves, 2013).

For d'Hauteserre (2015) the tourism experience is a result of an economy where the methods used seek to develop feelings and desires. Thus, tourism is often seen as a frivolous activity or as a giant commercial industry. However, as Filep (2014) points out it should also be considered for what it is an activity that people look for to increase their wellbeing away from the worries of everyday life. In accordance, Chen, Scott, and Benckendorff (2017) mentioned that traveling can be a way to let behind everyday stresses and, therefore promoting individuals' wellbeing.

Studies point out that in tourism, experiences are many times acknowledged as the results of mental, spiritual and physiological on-site activities (Chen et al., 2017). Agreeing Smith and Diekmann (2017) said that research indicates that travelling allows for experiences that can be physical, psychological, cognitive, affective or even spiritual. Therefore, it has the ability to change assumptions, expectations, ideas and ones' self. It can lead to a new way of seeing things and to self-development and improvement. It can create new meaning, fulfill needs and hopes and lead to new authentic experiences.

Pine and Gilmore (1998) were among the first ones to state four dimensions of the tourism experience, namely a) entertainment; b) education; c) aesthetics and; d) escapism. Along the way Kim, Ritchie, and McCormick (2012) suggested seven dimensions to describe memorable tourism experiences: a) hedonism; b) involvement; c) local culture; d) refreshment; e) meaningfulness; f) knowledge; and g) novelty.

Therefore, aligned with the idea of the experience economy is the idea of transformative tourism experiences, a one-of-a-kind proposal for the tourism economy. When an experience develops within a certain environment, with wonderful scenery, a new cultural context and the possibility of developing meaningful relationships with others, it can lead to the development of transformative experiences in the lives of tourists (Kirillova, Lehto & Cai, 2017). As Kirillova et al., (2017, p.509) reflected "Understanding characteristics and triggers of transformative moments of tourists' lives is hoped to help tourism practitioners to appreciate the very human side of a consuming tourist and to enable a more organic view of tourists as social agents."

The development of a brand should, therefore, consider the idea of conveying experiences (Chen et al., 2018). By giving memorable experiences to visitors, industry stakeholders differentiate themselves from others (Iglesias, Singh, & Batista-Foguet, 2011). When people encounter positive experiences in a destination loyalty can be the following outcome, increasing profit through recommendations (Chiou & Shen, 2006) and can also be an important asset to revisitation (Chen et al., 2018). As Bosangit, Hibbert and McCabe (2015) acknowledged a destination that can elicit an emotional reaction, preferably positive, has the potential to be understood as a better and more fulfilled experience. It is known that positive emotions can be triggered by memorable experiences and pleasant ones and that they will be important in future traveling decisions and even recommendations of a destination. Through the development of a destination brand, it is too possible to promote the uniqueness of its products and support its competitiveness toward others destinations (Chen et al, 2018), by showing off consistency and a sound strategy, and a keen understanding of the target groups for marketing and publicity endeavours.

Nonetheless, as Eide, Fuglsang and Sundbo (2017, p.453) acknowledged the development of new (brand) experiences does not end when it enters in the market, as they reflect "the concept continues to be developed; it must be adjusted, repeated, and slightly renewed in all experience deliveries if the concept is to keep a business competitive". So, the construction of an experience cannot stop after its implementation, it is fundamental to continually improve it, and see its impact on the industry and how people react to it. This idea of experience can be a tremendous asset for tourism businesses, as researchers found out that these experiences are crucial in tourists' satisfaction, decision making and future behaviors (Chen et al., 2018).

As tourism is growing immensely, its significance for local economies has grown recently, being it critical to train professionals and guarantee quality in tourism offers and being able to satisfy the clients' needs and desires (Corvo, 2011, p.94), to allow the industry to survive and, ultimately to thrive. Being it one of the biggest economy sources for many regions, it has also another unique characteristic, the fact that is one of the top world industries that runs across different cultures. But as today's world is facing major shifts, particularly with challenges such as wars, terrorism, technology, environment and many other issues, tourism is being confronted with this change in the way people see it and want to experience it, because now there is an increased interest in quality of life that is extending to tourism settings (Uysal, Sirgy, Woo, & Kim, 2015). Consequently, today new trends are emerging. Wellbeing stands out as a strong predictor of place attachment and research is finding that there is a growing market for experiences/vacations based on wellbeing. Thus, this trend is reaching the tourism industry where people may be leaning towards destinations that offer and promote wellbeing (Vada, Prentice, & Hsiao, 2019).

Therefore, currently, not only are the tourists different but also their intentions and desires, needs and wants are changing. This fact means that destinations have to keep up with these alterations and workers and stakeholders need to keep adapting and innovating if they want a chance to survive in the competitiveness of this sector. As Chen et al., (2018) remarked tourism is a great supplier of employment and of wellbeing, however as the same authors pointed out "Tourism demand is impacted by economic circumstances and lifestyle changes, with a greater emphasis on the visitor experience" (Chen, King, & Lee, 2018, p. 62). This means that there is a need to be attentive to these changes that tourism is facing. One of them is the fact that the new tourists have different characteristics. They are being described as spontaneous individuals, experienced, looking for high quality and "something more", in search for new experiences and authentic ones, concerned with the environment and also with the culture of their destinations. They are too more aware of their own lives and need of self-improvement (Paulisic, Tankovic, & Hrvatin, 2016). Following these important changes, Almeida (2016, p.155) stated that "To study the visitors' profile is a matter of survival, as well as, to communicate in new ways. New market research methods are definitively required, and the public administration needs to understand the ongoing socio-cultural changes…".

These shifts are making it a must, the conception of new products ideas, and stakeholders are vital for this development since they are a fundamental part of this industry and intimately linked to the destinations (Paulisic et al., 2016). As Paulisic et al., (2016, p. 238) acknowledged "The main challenge in creating a tourism product is the stakeholder engagement process, which should be tailored to the particular needs of the product, the destination and the situation." Mehmetoglu and Engen (2011) recognized that there are already some cases where the consumer experiences and the business's profits are combined, adding value to the experiences provided. But as Sipe and Testa (2018) regarded a memorable experience goes pass a specialized and poignant service for tourists. Researchers and businesses have to attend to the fact that both service and experience are growing and developing together, and that together, they can lead to meaningful and memorable tourist experiences. Tourism is more than an economic industry. If we are true to it, it is definitely a multidisciplinary endeavor with social, psychological and cultural factors that need to be considered and acknowledged. That is why other fields of study can give a major contribution to a better understanding of the on-going changes and even help tourism businesses to thrive. Psychology is one of these fields. Why? Because at its core, Psychology deals with people, being the tourism industry for and about people it only makes sense that these two fields can complement each other and as Simková (2014) regarded Psychology in tourism focuses, therefore, on studying individuals that are tourists.

Pearce and Stringer (1991) identified a set of different research themes or studies within Psychology regarding tourism, namely: a) physiological; b) cognition; c) individual differences; d) social behavior and e) environment. But when we apply psychological principles to tourism new questions arrive. The biggest one may be how is tourism seen from this perspective? Thus, who is the tourist? What drives them to a given place? What do they need and want to experience? How do they decide things related to their travels? (Simková, 2014). These are all valid questions that Psychology can help answer but for that, it is fundamental to explore the possibilities for common ground between fields, meaning that more research is needed. The complement of the areas is, in the authors perspective, crucial for the future of the tourism sector in itself, because by merging fields, ideas, concepts, and methodologies, innovation can be created and new and creative products and services may be developed.

PSYCHOLOGY AND TOURISM

Psychology as a science has been evolving rapidly in recent years. As the study of human behaviour, its research has grown exponentially in many different fields. In fact, there is a very big number of subfields within Psychology, each one focusing on specific concepts and or theories. For the purpose of this chapter, the authors will be focusing on a new emergent field, named Positive Psychology. As one of its main founders acknowledged, the main concepts of Positive Psychology can be important for other fields beyond Psychology and in truth, they are already being applied to education, health and many other grounds (Seligman, 2013). In an agreement, Titus (2017, p. 452) stated that "Positive psychology is comprehensive in coverage and multidisciplinary in its sources. It joins biopsychosocial research to psychological concern for positive experience, traits, and flourishing."

Liney, Joseph, Harrington, and Wood (2006, p.8) defined Positive Psychology as

the scientific study of optimal human functioning. At the meta-psychological level, it aims to redress the imbalance in psychological research and practice by calling attention to the positive aspects of human functioning and experience, and integrating them with our understanding of the negative aspects of human functioning and experience. At the pragmatic level, it is about understanding the wellsprings, processes and mechanisms that lead to desirable outcomes.

Still, while, looking for definitions of what is Positive Psychology, according to Nelson and Slife (2017, p.460), through a hedonic perspective "positive psychology is about studying the good life as a way of understanding and promoting happiness and feelings of well-being in individuals and perhaps societies". In this sense for Fulmer (2015, p. 1) "positive psychology does not ignore harsh reality as much as encourage an investigation into the entire spectrum of human experience, including those factors that contribute to fulfillment, not just distress". Boniwell (2006, p.2) also stated that,

According to positive psychologists, for most of its mainstream psychology (…) has been concerned with the negative aspects of human life. There have been pockets of interest in topics such as creativity, optimism and wisdom, but these have not been united by any grand theory or a broad, overarching framework.

The differentiating factor with Positive Psychology is the fact that it acknowledged the importance of concepts such as virtues and character strengths which allowed for its development in research but also brought good uses to practice (Titus, 2017). It focuses on the aims, values, drives, and motives that encourages people to develop and heal (Titus, 2017), which was not a common endeavor at the time that Martin Seligman acknowledged its emergence as a new field of studies within Psychology. Pawelski (2016a), as one of the main researchers of the field, regarded that the arrival of Positive Psychology did not come as a substitute of the current Psychology but rather as a complement for the field, giving new insights about the strengths and virtues of the human beings. In an in-depth analysis of what is the meaning of the "positive" behind "Positive Psychology" Pawelski (2016a, 2016b) concludes with four major points: a) Positive Psychology is more than the study of the positive; b) researchers defined the "positive" in a variety of ways; c) defining it is not simple, it is a complex task and it needs more research; and d) teamwork and interdisciplinary work is needed, one method or one discipline is not sufficient to understand the whole of Positive Psychology.

Agreeing with this last idea, Donaldson, Dollwet, and Rao (2015) acknowledged that Positive Psychology has had an enormous influence in many fields including education, public health, political science, economy, neuroscience, social services, management, leadership, organizations, and many others. For them, Positive Psychology can be seen as the science that focuses on the positive subjective experience of people, their positive personal traits and strengths and positive organizations/institutions. With this large scope, this fairly new field of knowledge contributes to the development of new ideas and areas of research about psychological processes and human behavior. According to Donaldson, et al., (2015, p.185) it is a shared belief amid positive psychologists that human beings look for lives with meaning and happiness, "In doing so, the field spans across multiple areas and can be applied in a variety of contexts including schools, communities, work, and family life". With this broad scope in mind, it comes as a natural progression that the area expands to other fields such as tourism.

The researchers Filep and Pearce (2013) discussed that the Positive Psychology model developed by Seligman and known as the PERMA Model has similar characteristics with the tourism experience. For a better understanding PERMA stands for Positive emotions (P); Engagement (E), Relationships (R), Meaning (M) and Achievement(A). These are, accordingly to Seligman the building blocks of wellbeing and, ultimately, contribute to flourishing. Seligman (2013, p.5) states that "'Flourishing' focuses on building upon the strengths of the individual to build the resilience to overcome challenges and enhance wellbeing", and it is one of the major concepts in Positive Psychology. Seeing this similarity, Filep and Pearce (2013) presented a series of studies that show how tourism can fit through each PERMA variable. As the researchers explained, tourism experiences can lead to situations of pleasure and happiness (positive emotions). It can also bring an immersion in the destination leading to skills building that can be linked to the engagement facet of the PERMA model. It can, too, bring new and positive relationships and it can transform a person live in a more intrapersonal level (meaning). Finally, these experiences have, likewise, the potential to increase the quality of life (achievement). Thus, Filep and Pearce (2013, p. 227) stated that

Some readers may have used PERMA as a personal or intuitive lens for studying tourist experiences. For example when daydreaming about the upcoming vacation our positive emotions might increase. Next, when mindfully proceeding some of the environmental or architectural details of sites we visit, we feel engaged. Further, when laughing and joking with travels companions or host communities' bond and build relationships. Achievement as another outcome of importance might be a priority after bungee jumping or white-water rafting. Finally, when we witness extreme poverty on our trips, we may question our meaning or sense of purpose in life.

The possible links between Positive Psychology and Tourism come as exciting news to the possibility of merging the fields since, beyond a consumer activity, tourism is also an activity where people can grow and develop individually being it linked with the eudaemonia wellbeing concept (McCabe & Johnson, 2013).

When people travel, they do it for many different reasons but the majority is, of course, to relax and, ultimately, to feel good and to enjoy life. Filep and Deery (2010, p. 407) believe that,

tourists' happiness is a state in which the tourist experiences positive emotions (joy, interest, contentment, and love), is engaged in and derives meaning from his/her holiday activities in the three main phases of the tourist experience (anticipation, on-site, and reflective phases).

In a reflection about Positive Psychology and Tourism, Filep (2016) went further along and suggested the emergence of a new subfield called Positive Tourism. As a definition, it can be understood as the search to understand human flourishing in tourism, with a more humanistic perspective focusing on the study of wellbeing in its main characters, which are the tourists, the host communities' and the tourism workers.

The focus on wellbeing come as a clear path since the science of Positive Psychology is the study of wellbeing (Scorsolini-Comin et al., 2013). Also, the experience economy is bringing new possibilities and changes with a direct impact in tourism. The buy and get of things are no longer enough, meaning and individual growth are also being acknowledged as a fundamental part of the experiences (Kirillova, Lehto, & Cai, 2016). Therefore, the introduction of Positive Psychology as the study of wellbeing in Tourism is a very natural step that has the potential to contribute to the development of new products and, ultimately, improve the tourism experience and the competitiveness of the industry.

Wellbeing in Tourism

The idea of wellbeing and its importance to Humankind has not seen in Positive Psychology its first attempt to understand it or even study it. The relevance of wellbeing throughout the centuries and in different disciplines (including tourism), is clear in Smith and Diekmann (2017, p. 1) affirmation,

Wellbeing has been a philosophical and sociological concern since the beginning of time, especially for key thinkers and academics. Philosophers throughout history have examined human life satisfaction and the meaning of happiness. This search for an understanding of human wellbeing has extended over time to disciplines such as psychology, health sciences and economics to name just a few. Being by nature multidisciplinary, tourism studies have also become more focused on wellbeing in the last few decades, both from a theoretical and methodological perspective.

Wellbeing is a complex construct that is deeply related to people's culture. What is considered good for someone may not be considered to another (Smith, & Diekmann, 2017). As Smith and Diekmann (2017, p. 3) stated

Human beings tend to act in pursuit of what they think will give them more pleasure and the greatest balance of pleasure over pain. Yet it is debatable in many circumstances as to whether what seems good to a person is actually good for a person, especially in the context of health and even tourism.

Considering the construct of happiness, many times associated with the wellbeing concept, it can be defined differently by researchers (Filep & Deery, 2010). However, two relatively common definitions consider it as 'subjective well-being' or 'authentic happiness" (Filep & Deery, 2010). 'Subjective well-being' follows a more hedonic approach and it is related to pleasure or feeling good or bad (Filep & Deery, 2010). The 'authentic happiness' endures a deeper connection and the idea of meaning in life. It goes beyond the 'here and now' pleasure and looks for people capabilities and strengths (Filep & Deery (2010). As a crucial concept of Positive Psychology, wellbeing can be understood from its philosophical roots and thus, two very important notions arise: hedonic and eudemonic wellbeing. The first one focuses on positive emotions, happiness, and immediate pleasure; the second one involves a more personal development. While hedonic wellbeing comes from the idea of feeling good at a given moment, eudaimonia wellbeing can come from a not so good activity at a certain time but at long term can have positive outcomes even after the activity is over (Vada et al., 2019). Very simply the concept of hedonia relates to the search of pleasure that allows for immediate wellbeing. The eudaimonia concept, contrarily, can be developed from not so pleasant activities, however having positive outcomes later on. This last concept is, therefore, interconnected with the development of human potential, with a focus on psychological wellbeing related to activities with meaning and value and not only for immediate pleasure (Smith, & Diekmann, 2017). Vada et al., (2019, p. 324) stated that,

(…) memorable tourism experiences significantly influences place attachment, and that hedonic and eudaimonic well-being fully mediates this relationship. The frequency of visits does not influence these relationships. Tourists develop an attachment to the destination when their experience is memorable, satisfying and enhances their purpose and meaning in life.

Filep and Deery (2010) remarked that it is possible to comprehend tourists' happiness by studying concepts such as positive emotions, meaning, and engagement. Furthermore, Smith and Diekmann (2017) recognized that joining hedonic and eudaimonic experiences can lead to long term positive outcomes. Tourists almost always look for a pleasant experience and expect to have a good time. Therefore, the idea of fun should not be disregarded, however, it is more probable that longer-term gains lie in the joining of both hedonic and eudaimonia experiences (Smith, & Diekmann, 2017).

Hence, Tourism can be an important environment to experience wellbeing (Filep & Higham, 2014) and research has also demonstrated that memories of vacations can concur to people happiness and wellbeing. Moreover, as acknowledged by Loureiro (2014, p. 1) "tourists seek appealing, unique and memorable experiences shaped by their motivations, prior travel experiences, individual perceptions, behaviors and ways of coping with the environment (…)". As people face tremendous demands and fears all year long with impact on their social lives, vacations are seen as a big hope to leave behind a year of troubles and be in a new place that can bring a sense of happiness, renewal and, ultimately, wellbeing (Corvo, 2011). Thinking about wellbeing and tourism, Uysal, Sirgy, Woo, and Kim (2015) reflected that wellbeing and quality of life are part of the tourism definition, meaning that tourism influences the wellbeing of everyone in the destination communities. This fact implies that contexts and the singularity of destinations should be taken into account when doing research in this topic and the study of certain life domains must consider the present and development needs of destinations and their planned aims and objectives.

Some Issues and Concerns

The idea of reinventing tourism is not without some concerns about the more recent developments in the industry and the new consumer's trends, behaviors, and perceptions. Aligned with these new developments in the tourism sector, Sotiriadis and Apostolakis (2015) acknowledged that some destinations are facing a major growth. This is leading to the need for tourism destinations to find strategies to overcome the challenges and threats that come with this spur of development. The idea of experience economy also brought as a priority to stakeholders the need to give memorable tourism experiences. Thus, today tourists are requesting more than ever, experiences that are authentic, to decide upon a destination. For this, the host community interaction with tourists and the quality of this interactions can be a unique element for the whole experience. But this quality is dependent of how the locals see their own wellbeing regarding the tourists (Croes & Semrad, 2018). The relationship among destination competitiveness and wellbeing is vital for destination competitiveness theory. But also, the relationships between people (host community, workers, and tourists) is becoming more important than ever and thus understanding its role on destination competitiveness may be a source of knowledge to further endeavors in this field. As reported by Croes and Semrad (2018, p. 88)

Interactions among individuals and the context of these interactions may promote or assuage trust, innovation, productivity, memorable experience, rewarding careers to the detriment of competitiveness, thereby affecting quality of life. Therefore, further research is needed in ascertaining if human agency is critical in framing destination competitiveness (...).

When thinking about destination competitiveness Vengesayi, Mavondo, and Reisinger (2013, p.82) stated that it is linked with how a destination outperforms others in terms of good and services, and who “gives” better tourism experiences to its visitors. However, it is regarded that

the promises of quality product and service excellence are no longer effective in differentiating one destination from the order (…). In order to make tourism a more profitable industry in the long term, its developers and managers follow a new competitiveness paradigm (...) (Vengesayi et al., 2013, p. 82).

Today destinations strive based on the quality of their physical environment, adequate environmental practices, image branding, good marketing strategies and through an active and efficient tourism policy (Vengesayi et al., 2013).

Soteriades (2012, p. 107) reflected that new challenges are coming due to new consumers and environment trends. Just those who understand these changes and recognized that something needs to be done, in a proactive form, will be able to succeed. This leads to the importance of developing new strategies to compete with other destinations. As Soteriades (2012, p. 107) puts it destination management organizations (DMOs) “need to be more forward thinking than ever before.”, because they are already facing challenges. As the same researcher acknowledged two major ones are already here:

a) the reconciliation of the need to consolidate the industry’s service offerings to the consumer and maintain a market position with the need to remain flexible enough to respond to changes in its operational environment; and b) to design and properly deliver products and experiences corresponding to the needs of the various markets (Soteriades, 2012, p. 109).

All these imply the need for marketing strategies that must take into account the ongoing trends but also it is important to have reliable data to make informed decisions. Data is the building block for new planning that can allow better decisions, and it is fundamental to promote meaningful and efficient strategies (Soteriades, 2012). In a study led by Vinyals-Mirabent (2019), it is stated that the attractors of a destination are crucial for its success, being architecture, culture and gastronomy main elements for image branding and fundamental for destination competitiveness. Also, the researcher highlighted that history, accommodation and leisure activities act as differentiators between European cities.

Since tourism destinations compete between them to attract people, including tourists and stakeholders, when a destination has a positive status within the field it is way easier to attract attention and therefore, to promote a destination and to strength it as a place that is worth to know (Komsic & Dorcic, 2016). Nevertheless, Cubbon (2019) stated that looking for more profits through more visitors can be blind sighted. Leaders on destination marketing are agreeing that only focusing in the numbers as was until now is a very short-term vision of the future of tourism.

Nonetheless, for a very long time, marketing has focused on destination products and what they have to offer. However, the concept of wellbeing linked to tourism has the power to be a very strong marketing stunt, since it focuses on the idea of improving peoples' happiness and, ultimately their wellbeing. Linking constructs such as wellbeing, happiness, satisfaction or quality of life to tourism endeavors and making it an important part of the travel experience as also of people lives, can deliver a tremendous marketing message regarding the destination in itself (Sangpikul, 2010).

Being truthful and according to Smith and Diekmann (2017), there are already some businesses that are merging the idea of meaningful experiences with cultural and with hedonic ones. These offers are not only meant for tourists' wellbeing but simultaneously are being promoted as sustainable and increasing residents' wellbeing. The contribution of Positive Psychology and particularly its study of wellbeing can be a great asset to businesses in the tourism industry. And as Busser and Shulga (2018) said when co-creating experiences and allowing tourists to be involved in the decisions, it can potentially conduct to better psychological wellbeing. Similarly, Garcês, Pocinho, Jesus, and Rieber (2018, p.42) reflected that "Researchers are now considering that there is a merging between Positive Psychology and Tourism Psychology that can lead to the development of positive changes and enhance psychological wellbeing". Therefore, by focusing on wellbeing in tourism, it is potentially a win-win situation, both for businesses and for tourists themselves, but also for the host communities that can see their local economy rise and, ultimately, their wellbeing.

Case Study "The Tourist Wellbeing Project"

The Tourist Wellbeing Project is a leading study being developed on Madeira Island, Portugal. It was thought and applied for research funds and won as a post-doctoral research project. From the very beginning of its development, it focused on understanding tourism through Psychology. The conceptualization took the roots of Positive Psychology and focused on creativity, optimism, and spirituality plus wellbeing. The authors' goal was to develop a project that aimed to study the tourists, not from a purely economic perspective, which is the usual approach, but from an entirely different field.

The "Tourist Wellbeing Project" took a rather innovative approach by focusing on the people themselves, on who they are and what they like to do. As already mentioned above, Psychology comes as natural field and complement to and for tourism. Psychology studies people and the tourism industry subjects are people who are away from their usual home for a certain period of time. As Jani (2011) said when studying tourist's personality, researchers refer to the adaptation of a person personality to a destination that is different from their typical daily home. This means that tourists are not merely numbers. Of course, the economic part will always be fundamental to allow this industry to survive but if businesses forget that first and foremost, they are dealing with people, they will undoubtedly fail in their endeavours. Tourists personality and what they really are, is fundamental to understand them and what they want to achieve with their travel. In accordance with this idea, Passafaro et al., (2015) mentioned that personality characteristics as, for example, being open to experience or extraversion, are reported to be linked with tourists' preferences. However, the authors of the project took a step forward by choosing to focus on the idea of wellbeing, rooted in Positive Psychology. The other variables (creativity, optimism, and spirituality) came as natural additions. Creativity is related to the development of something new and unique (Bacon, 2005) and it is also considered a character strength in Positive Psychology being part of the wisdom and knowledge virtue (Peterson & Seligman, 2004). Therefore, those who travel are seen many times as adventurous, who look for new and exciting things to do and to see. Also, tourism businesses themselves are trying to be creative and develop new products that can attract tourists, so the variable creativity was understood as an important element for this research. Optimism is a crucial variable in Positive Psychology, and as Filep and Pearce (2013) said it is very important when traveling so people can deal better with some negative events that may occur, for example, loose baggage while traveling. Finally, spiritually may be a somehow "strange" choice but the author's think of spirituality as looking for something higher than ourselves. Spirituality, in this project, is not about a God, it is about the search for something meaningful in life that can, for some people, take the direction of religion but for others not. Therefore, it is a much broader concept than religion. Similarly, in a previous work (Garcês, Pocinho & Jesus, 2018b) it was found that variables such as optimism are lacking in tourism research and that tourism can be a spiritual endeavor where people search for individual enrichment in their lives.

Ultimately, all three chosen variables and wellbeing came together as theoretical constructs that contributed to the development of the conceptual model HOPE that is the background for this project. The HOPE Model, which means Human Optimal Psychological Experience,

(…) addresses a personal state of fulfilment that occurs during an 'experience' in which the person's wellbeing suffers influences from his/her creativity, optimism and spirituality. As in a loop situation, individuals' wellbeing influences their 'experiences' in a given moment and is influenced by them (Garcês, Pocinho, & Jesus, 2017, p.341).

Therefore, with a theory built, it was time to put into practice the project idea. Next it is presented the main goals of this project, how it is being implemented and the expected results.

Why, How and What to Expect?

For a better understanding, the main and central aim of the project is to study tourists' wellbeing in Madeira Island, Portugal. Overall, it was possible to specify three sub-goals: 1) to evaluate tourists wellbeing in Madeira, through the assessment of creativity, optimism, and spirituality, while simultaneously understanding which tourism activities are more attractive for the tourists in Madeira and, therefore, build a psychological profile of the tourists; 2) to look for significant relationships between the psychological variables and the activities performed by the tourists and; 3) to develop an *app* that allows to customize the tourism product offers and activities accordingly to the psychological profile of the tourist. Hence, this project involves Psychology, Tourism and in its last stage, Technology application.

Generally speaking, the project was developed having in mind that tourism is the main economy in Madeira Island. Madeira is in a maturity phase regarding tourism and it has one of the longest histories as a destination. Hence, it needs to adopt new strategies to avoid future declination. Hopefully, this project will bring new insights about who are the tourists who visit the island and it will be possible to develop new (requalification) endeavors by producing product offers aligned with the current trends, wants and needs of the tourists. It will also be a new source of information from a specific field as is (Positive) Psychology that will allow for a new perspective about consumers trends, in this case, tourists.

It is, therefore, an innovative project that offers a new way of seeing and understanding the tourist, who looks more and more for their wellbeing in its many different forms being it physical, mental, social, spiritual or emotional. These new lifestyles ideas imply that the offers need to consider new niches and particularly new concepts such as wellbeing and happiness. Thus, leading to the idea that travels should or may be conceived accordingly to peoples' interests. By understanding and studying wellbeing and the tourists themselves, it will be (hopefully) possible to customize services and products more adequately to each tourist as an individual and not only as an income number. Here it is relevant to mention another project that is being developed in Slovenia called Tourism 4.0 and that has similar goals to the "Tourist' Wellbeing Project". Tourism 4.0 uses new technologies to promote a personalized traveling experience that is more efficient, safer, greener, with optimized time handling and with less costs. It is a project that aims to change how tourism is conceptualized and its

main ambition is to build an interactive platform based on the state-of-the-art technology infrastructure, guaranteeing the sustainable development of services and products, accessible to everyone at any time. It will facilitate the tourist's integration into the destination, increase the quality of the experience and support individual's interaction to develop tailored products and services. (Peceny, Urbancic, Molorel, Kuralt, & Ilijas, 2019, p.4)

In this project, the host community has a big relevance and are active participants, being also co-creators of tourism experiences (Peceny et al., 2019, p. 5). Tourism 4.0 comes in the authors view as an attempt to modernize the industry, making use of the new technological developments while also being concerned with the many challenges tourism is facing. However, despite being a project with similar aims to the "Tourist Wellbeing Project" in Madeira, in this last one a different approach is being used by focusing and using information that is related to the individuals own psychological characteristics to promote personalized tourism experiences. Here, the idea is to obtain intraindividual data that sometimes people themselves don't even acknowledge. It is about understanding tourists themselves as an individual and his/her personality and how it is possible to customize experiences based in what people "really are".

In practical terms, the project is divided into three stages for a three-year period of time (Table 7.1) and it is, currently, in its second year of implementation. Thus, in the first year, a very in-deep literature review was developed leading to an intensive process of construction and validation of the Tourism Well-being Scale (Garcês et al., 2018a), an instrument built upon the HOPE model and that aims to measure tourists' wellbeing from a Positive Psychology perspective. This instrument also has items dedicated to identifying which activities the tourists undertake in Madeira so, in the future, a possible, statistically relationship may be explored. The second year of the project, which is underway, is about data collection. This process will take about a year since Madeira is a very international and renowned destination and has a variety of special holidays and events throughout the year that are important to understand in the context of tourism. So, it is an aim to cover all seasons and all holidays on the island so a more complete understanding of the tourists is possible. Therefore, at the moment, results are not available since data is being collected. The last stage of this project will be about exploring data throughout statistics software. It is also an aim to build an *app* where future tourists can fill the Tourist Wellbeing Scale and, through there, obtain their psychological profile and choose, if they want, the suggested activities that, hopefully, will lead them to feel better in Madeira.

Table 1. Tourist' wellbeing project timeline

Stages	Aim	Expected Results	Status
1	Literature review Development of psychometric measure	Deep knowledge about the project main variables: creativity, optimism, spirituality and wellbeing. Tourism Wellbeing Scale (TWS).	Finished
2	Data collection	Database with data from all-year round of visitors including the different seasons, holidays and festivities.	ongoing
3	Data analysis *App* development	Obtain psychological profiles through statistical analysis and its relationship with tourism activities in Madeira TWS *app*	Expected in 2020

Source: Own

As a new endeavor in understanding tourism, this project was built in alignment with Madeira Smart Specialisation 2020 (Agência Regional para o Desenvolvimento da Investigação, Tecnologia e Inovação, 2015). So, the project aims to build knowledge in Tourism an industry that has a direct influence in the regional economy, through Positive Psychology. Tourism in Madeira is in a mature stage, and decline should be avoided by adopting new strategies. This research aims to bring new and much needed data about tourists' wellbeing, to increase knowledge about the tourism phenomenon, characterize the tourists' profile, and ultimately, lead to tourism products and services requalification. This will allow to build, develop and monitor a system of information about the visitors, allowing to know them better, and also their consumption activities. Overall, the project is aiming to increase human resources in tourism in Madeira, but also to build networks of cooperation, and increase Madeira competitiveness. This study about wellbeing is innovative, and offers a trendy vision of the tourists that look for more wellbeing experiences being it physical, mental, social, spiritual and emotional. These new lifestyles imply that looking for tourism experiences is now different, so travel should be designed accordingly and destinations have to think about these changes. Studying wellbeing and how it relates to the attractors in terms of tourism offers, will allow to potentiate a new and personalized offer to the client, while promoting his or her satisfaction and wellbeing, thus contributing to Madeira competitiveness.

SOLUTIONS AND RECOMMENDATIONS

The time is to innovate and to do it now. Tourism and, therefore businesses in this industry cannot stay behind incurring in the risk and error of being left out of the advances that the world is facing. The challenges are grand and so, innovation and creativity must accompany it. As Paulisic et al., (2016) stated the process of innovation comes from the need to respond to a challenge or a necessity and has the potential to promote the economy. A business can only succeed if their services or products distinguish themselves from others. This is possible if they recognize that customer needs and desires can change, if gaps in the segment are found and, consequently, businesses fulfil those gaps by developing new and innovative products that meet the changing needs of the customers. Thus, the idea of introducing wellbeing must be considered a legitimate and sustainable option to tourism as a new and innovative endeavour to create knowledge and develop novel and memorable experiences.

As Smith and Diekmann (2017) acknowledged wellbeing is a recurrent word of the present decade very much linked to peoples' daily lives and activities. However, despite this, the study of wellbeing in tourism is fairly recent (Smith, & Diekmann, 2017). Why should the industry be focusing on wellbeing? Well, research has shown, so far, that Positive Psychology variables, such as wellbeing, are linked to better life outcomes, for example, less divorces, more professional success or even better relationships and health (Butler & Kern, 2016). The question should be what are businesses waiting for? They have in this concept the possibility to go beyond the ordinary, to be different, and attract more and new customers, why not do it? Wellbeing can and should be considered as a possible strategy to innovate and as Pyke, Hartwell, Blake, and Hemingway et al., (2016) mentioned wellbeing can be a business resource to grow local economies.

As asserted by Smith and Diekmann (2017, p. 5),

In a tourism context, there may be few long-term wellbeing benefits from hedonic holidays where the tourist is 'happy' (…). On the other hand, eudaimonic experiences where tourists engage with local residents and even help them through volunteer work or charity may lead to self-development and transformation.

Parsons, Mackenzie, Filep, and Bryner (2018) acknowledged that leisure can lead to unique wellbeing outcomes that may not be possible through other life activities. So, why not "join" these two worlds and together think and do differently? This interdisciplinarity should be in the research agenda as a strategy to promote psychological wellbeing as a unique creative resource for businesses in the tourism industry. Tourism experiences should encompass the introduction of wellbeing and particularly eudemonic wellbeing, even if, the idea of tourism experiences is still fairly recent as a main topic in tourism studies (Chang, 2018). It should be the centre of concern for researchers and practitioners of tourism today because of its tremendous possibilities for the innovation of the sector. This industry is undoubtedly a consumer action but if perspectives are changed it is clear that it also has the potential to endorse personal development, particularly when connected with eudaimonia concepts (McCabe & Johnson, 2013). Garcês, Pocinho, and Jesus (2018a, p. 56) recognized this and remarked that

Research in tourism and particularly wellbeing is increasing and we are seeing that wellbeing can be a brand differentiation offer for destinations (…). The idea of experience, of feeling the moment and really living it is gaining awareness and the "experience economy" is a proof that people want something more and tourism has in here an opportunity for innovation and destinations an opportunity to offer something unique for their visitors.

Here may lie the innovation for the future and a solution for tourism to deal with the on-going changes in the world. Therefore, the solution may be to wager more in the idea of intangible resources such as wellbeing, since "It is not enough to present 'souvenirs' anymore, the tourist wants more in-depth and intrinsically rewarding experiences" (Garcês, Pocinho, & Jesus, 2018b, p.8). In accordance, Hartwell et al. (2016) reflected that the shift being seen toward intangible resources has its ground in Positive Psychology and this can be a new and innovate technique to promote a destination as a place for wellbeing.

FUTURE RESEARCH DIRECTIONS

Wellbeing can be, as is the authors' belief, a key resource, and strategy for the future of tourism. However, the way it is implemented or study will also have an impact on how we understand its influence in tourism. It is very clear that if we considered the two traditional ideas of wellbeing: hedonia and eudaimonia, this last one loses in terms of number of studies (Vada et al., 2019), therefore, it is important to develop more research following eudaimonia constructs to get a better understanding of it (Filep & Laing, 2018). Nonetheless, in wellbeing, it is possible to have multiple directions and starting points. It, however, makes sense that research should be venturing toward new grounds and eudaimonic wellbeing seems a natural approach as it is a concept related to the idea of personal fulfilment and development that people are looking for.

From literature research and from the authors own endeavors it is also important to understand that the industry is not made only of tourists. There is a big network of people involved in the leading of a destination toward a place of tourism activities. This fact is also acknowledged by researchers of the field (Filep & Laing, 2018) and this means that more research is needed regarding tourism, including a better understanding of the host communities and tourism workers and stakeholders. As Filep and Laing (2018, p. 7) stated there is a need "for further development of research on what enables host communities to flourish, what encourages workers in tourism sectors to thrive and what makes tourist experiences optimal." This view highlights the merging of Positive Psychology with Tourism while acknowledging that this sector has three pillars that are its foundation: the tourists, the destination and the workers/stakeholders. A fine balance is needed, between these three very important pieces, to keep improving the industry. One does not live without the other, however in acknowledging this fact, it is also fundamental to understand that it is crucial to reinvent tourism but it is also of great importance to recognize that happiness, satisfaction, and wellbeing are essential factors (Garcês, Pocinho, Jesus, & Rieber, 2018) for all of these three building blocks of tourism.

CONCLUSION

Now, more than ever, creative minds in multiple fields of knowledge must come together to achieve success and to thrive. The joining of Psychology and Tourism thus, should not come as a threat to an existing *status quo*, but as an innovation to these contexts. Multidisciplinary is a must and as shown with the "Tourists Wellbeing Project" it is possible to join synergies from different fields and work together towards a shared goal.

These new developments in the field bring hope that Psychology and Tourism can contribute to each other growth. It also gives insight that it is possible to work together and that it can even be an asset for the future of the Tourism industry in itself. The world should not be afraid of these possibilities, these come as a natural evolution of society, of the minds, of science, and of the current and future needs of the world. These new endeavors should be embraced as opportunities to innovate, to be different and to create new value sources that have the potential to lead both fields toward common ground and to thrive and not only survive. The future will, therefore, be influenced by what we do today. And what we should do today is to start by understanding the shifts been seen in society and adapt to it. It is also time to open minds, accept the inevitability of the uncertainty of tomorrow and prepare the best way possible. It is about going a step further of what is known and try to develop new information and gather new data so new guidelines can be developed. It is also about taking advantage of what is already known, create and present new products and/or services to the fields.

Wellbeing understood from a psychological point of view can be, as shown before, a potential tool to promote a destination and a key element for its competitiveness. It has also the likeability of being a creative resource for businesses in the tourism industry as a nontangible but very valuable product.

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KEY TERMS AND DEFINITIONS

Eudaimonia: the concept of feeling good at a longer term as a result of self-development and individual growth.

Experience Economy: an economy construct where the idea of experience is the “sold” product by businesses.

Hedonia: the concept of feeling good momentarily.

Innovation: the process of developing new and original products and/or services.

Intangible product: a good or service that is experienced in an indirect form by the consumers through, for example, emotions or behaviors but that is not palpable physically.

Positive Psychology: the field of Psychology that studies wellbeing and the strength and virtues of individuals, communities and organizations and how they can thrive.

Psychology: the study of human behavior, cognition and emotion.

Psychology of Tourism: a new emergent field where psychological principles are applied to tourism settings, i.e., a new emergent field that studies people in movement (travel).

Tourism: the industry or sector that deals with people that travel, and that has three main actors: tourists, host communities and workers/stakeholders.

Wellbeing: the sentiment of feeling good and fulfilled.

Chapter 8
Post, Ergo Sum:
Social Media and Brand Competitiveness in Tourism – The Case of Molisn't

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ABSTRACT

Social media launched a "tongue-in-cheek" trend taking a comic approach to state that Molise— an Italian region—doesn't exist; several reactions appeared online, since this discourse may affect the attractiveness and image of a territory. Therefore, this chapter aims to analyse the online actions and counteractions to describe the role of the actors and the modalities by which they reacted. Literature showed a growing interest in the ties among destination marketing, destination image and competitiveness, and social media. A multi-level approach has been chosen in identifying the actions and reactions of actors. Due to the research context, the authors performed a netnography and identified six categories of actors. On a theoretical side, the levels of analysis – macro, meso, and micro – are mutually influencing, as actions and reactions take place at various levels. On a practical side, the awareness of actors in understanding the need to support the territory represents a suggestion for policymakers, as they should engage in actions to combat the negative image of the region.

INTRODUCTION

This chapter deals with the effects of a multilevel online discourse on the attractiveness and image of a territory. More in detail, an analysis is run on an online phenomenon involving multiple actors in a debate over Molise, a small region in the South of Italy. The long online debate has been shaped around two perspectives—the first taking a comic approach to state that the region doesn't exist and the second seeking to legitimize what the region can offer and to recover its image.

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The statements about the non-existence of the region originated as a “tongue-in-cheek” online trend based mostly on the limited dimensions of the area, the limited awareness that people have of the local attractions (especially as compared to the surrounding regions), and the weak conditions of the infrastructure.

On the other hand, the counteractions of both local and external actors seek to recover the region’s image and to develop the tourism that may have been damaged by the negative *e*-word of mouth.

The statement that Molise doesn’t exist feeds the idea that there are no attractions in the region, which affects one of the pillars—perhaps the most relevant one—of the concept of a tourism destination (Cooper et al., 1993; Holloway, 2006; UNWTO, 2007).

Therefore, the aim of this study is to analyse the online actions and counteractions related to this phenomenon in order to describe the role of the actors who joined the debate and the modalities by which they chose to react; recent reviews (e.g., Teixeira and Ferreira, 2018) showed a missing focus on the online context as it affects the tourism business, its competitiveness, and the interplay between territory image and those acting on it. As a consequence, this research will describe the different choices of various actors who control the region’s image and seek to increase regional competitiveness from the perspective of tourism. Some potential drivers of tourism development emerged in the debate, counteracting the false views of the region; these drivers included the historical centers, the coasts, the local culture (e.g., products, events, and folklore), and the natural environment.

Several studies focused on the role of e-communication (Wu and Yi-kuan, 2005) in enhancing the image of an area; the industries affected by the communication actions of various actors are several, but tourism and hospitality—and the services related to them—are especially affected. This is particularly relevant in cases in which the effects on image are then transferred to tourist attractions, cultural heritage, local events and products, and the natural environment.

Scholars paying attention to the role of image on tourism activities have focused on the concept of destination competitiveness and, more recently, the multiple and differentiated roles of actors affecting or involved in (directly or indirectly) the building of the *destination image* (Bellini, 2004; Neto, 2007; Martínez-Ruiz et al., 2018) through the use of new technologies (Wang and Law, 2013; Shen et al., 2015). Finally, in line with the aim of this study, the process of *destination-image recovery* (Saraniemi, 2011; Ryu et al., 2013) has been taken into account as a useful means of framing and interpreting the dynamics of reactions and counteractions. The theoretical background led the authors to frame the research in order to accomplish their aim and to highlight a novel element, namely, image recovery to attain competitiveness and attractiveness following an online debate that was aimed to be funny. Indeed, previous contributions highlighted image recovery as a consequence of natural events (Ryu et al., 2013), social issues such as crime (Dimanche and Lepetic, 1999), and the failure of local ancillary services (Voltes-Dorta et al., 2017).Thus, to summarize the aim of this research is to describe the action-reaction dynamics of a multilevel debate over tourism; to do that, multiple online sources will be investigated through a netnographic analysis. This aim is based on the interactions among scholars in their debate over a tourism destination and the use of social media in destination marketing. Therefore, the literature review is devoted to these two topics. Then the research process is described, leading to the analysis and discussion. The chapter continues with both theoretical and practical implications and ends with conclusions and proposals for further research.

TOURISM DESTINATION

Destination marketing is one of the most debated topics in tourism management and marketing literature. According to the UNWTO (2002), it can be defined as follows:

A local tourism destination is a physical space in which a visitor spends at least one overnight. It includes tourism products such as support services and attractions, and tourism resources within one days return travel time. It has physical and administrative boundaries defining its management, images and perceptions defining its market competitiveness. Local tourism destinations incorporate various stakeholders often including a host community, and can nest and network to form larger destinations.

Apart from motivating tourists to visit the area, scholars identify some pillars shaping tourist destinations, known as *destination mix* or the *4As approach*, considering *attractions*, *amenities*, *accessibility*, and *ancillary services* (Cooper et al., 1993: 81).

With the passage of time, other several contributions aimed at identifying the pillars or fundamental characteristics of a tourism destination have been provided; for example, Buhalis (2000) proposed the 6As model, which includes *attractions, accessibility, amenities, available packages, activities*, and *ancillary services*. A six elements model is also proposed by the UNWTO (2007), including *amenities, accessibility, attractions, human resources*, *image* and *price*.

According to Pike (2004), "*DMO often represents a large and diverse range of destination attributes, including natural features, commercial and not-for-profit facilities and amenities, and people"* (2004: 3).

Finally, another interesting contribution has been provided by Fernando et al. (2016), who added to the model by Cooper et al. *awareness* as the fifth pillar or, more correctly, as the first of five pillars, because it is conceived as an element determining the interest of the potential tourist.

Emerging from the cited contributions, first of all, the destination must be intended as a system of different resources, a set of elements able to attract tourists; in this regard, Pike talks about the *multi-dimensional nature of destinations* (2004: 11). Of course, it must be assumed that a destination is not a closed system because it constantly interacts with the external environment, namely, a *viable system* (Beer, 1979; Carrubbo et al., 2012; Arenas-Resendiz, 2017), a territory able to generate tourist demand thanks to the existence of valuable resources, real or potential (attractions).

In line with the aim of this chapter, two more aspects must be taken into account when talking about the configuration of a tourism destination: its image and the degree of competitiveness. Go and Govers (1999) focused on the competitiveness of a tourism destination as based on seven elements: *facilities, accessibility, quality of service, overall affordability, location image, climate and environment*, and *attractiveness*, while Uysal et al. (2000) focused on the importance of *positioning, branding, image,* and *awareness*, as determinants of destination competitiveness. Finally, Mottironi and Corigliano (2012) described *image* as "*a key driver of destination marketing strategies, as it has been largely identified as one of the most important factors for tourism destinations in order to increase their attractiveness and differentiate from competitors*" (2012: 162).

In the following paragraphs, these two topics and their linkages to the tourism destination conceptualization will be analysed in more depth.

Destination Image Building

The brief description of the tourism destination and the analysis of the main definitions and models led the authors to assume that the destination can be considered as a product to be proposed on the market. In fact, in 1995, Palmer and Bejou introduced the concept of a *tourism destination product*. As known, the characteristics of a product affecting the decision-making process (Leisen, 2001; Shen et al., 2015) and then the purchase include *(a) price; (b)product composition characteristics such as taste, aroma, color, style, and size; (c) packaging; (d) brand or manufacturer (i.e., corporate) and store image; (e) advertising; (f) word-of-mouth reports; and (g) past purchase experience*(Jacoby et al., 1971: 570).

Other scholars regard the destination as a set of tangible and intangible components (Stephens Balakrishnan et al. 2011), namely, an augmented tourism product assembled to offer an integrated experience to consumers (Buhalis, 2000). One of the first contributions comparing the tourism destination to a product to be marketed was provided by Medlik and Middleton (1973), who suggested that the destination product consists of five components: *destination attractions*, *destination facilities*, *accessibility*, *images*, and *price*.

To sum up, apart from the price and the core features characterizing the destination as a product, image appears as one of the most relevant aspects motivating the tourist; indeed, "*for destination marketers, perhaps the most significant aspect of an image is its influence on travel behavior*" (Leisen, 2001: 50).

Various elements participate in building a destination's image; first of all, local administrations and firms—and even more frequently, the community—shape the destination image based on their perceptions. In this regard, scholars such as Baloglu and McCleary (1999) suggested that several sources affect the building of a destination's image, among them the experiences and opinions shared by tourists. In line with this, Lin et al. (2007) suggested that the destination's overall image has two components, namely, cognitive and affective attributes, as confirmed even by other scholars (e.g., Bigné Alcañiz et al., 2009). The two attributes depict how individuals perceive a destination, since the cognitive side is a mental state of a person, while the affective side depends on feelings.

In detail, "*the cognitive image component consists of beliefs and knowledge about a destination, primarily focusing on tangible physical attributes; the affective image component, on the other hand, represents feelings about a destination*" (Pike and Ryan, 2004 in Hallmann et al., 2015: 96), where the cognitive image is a prior element that can influence the affective image (Lin et al., 2007). Indeed, while the former is shaped by the background and previous knowledge about a destination, the latter is shaped by perceptions and feelings about a destination. Additionally, the two elements are contributing in shaping a destination image, based on how strong the cognitive and affective attributes are. Their combination lead to an overall image in an individual's perspective, acting as a driver in shaping destination preference. The effects on preference stimulated a long-lasting debate, because some scholars contrasted this vision (e.g., Kim, 2018) when stating that the outcomes of experience – as satisfaction – can greatly modify the preferences, or by recalling conative (Pike and Ryan, 2004 in Hallmann et al., 2015) as one more component of destination image, deriving from a tourist behavior and the intention to revisit (Stylidis and Cherifi, 2017). On the other side, several scholars (e.g., Hernández-Mogollón et al., 2018; Kim et al., 2019) endorsed this model by applying it to empirical research.

Feelings on a destination lead the discussion on how information, experiences, impressions (Reynolds, 1965).When one scans literature on image building, word of mouth (WOM)—that is, information provided by family members and friends among others (Brown and Reingen, 1987; Anderson, 1998)—still emerges as a key aspect of decision-making. The development of new technologies transformed the modalities through which such information and opinions are spread; technological advances led to the (electronic) evolution of so-called sources of influence; word of mouth is now e-word of mouth (Jansen, 2009; Chu and Kim, 2011; Tham et al., 2013; Luo and Zhong, 2015) or even word of mouse (Chen et al., 2014), spread mainly by social media, considered as web-based applications that disseminate user-generated content (Kaplan and Haenlein, 2010; Goh et al., 2013; Narangajavana Kaosiri et al., 2019).

Recent studies, both theoretical and empirical, highlighted the significant role of new media in destination image building and, as a direct consequence, in tourists' decision-making; furthermore, ICTs and social media are recognized as a cost-effective marketing tool that can provide travel information and help shape the image of the destination (Shen, et al., 2015; Martínez-Ruiz et al., 2018).

Finally, the authors took into account destination image recovery as a form of reaction of local actors and administrations in cases of damaged image. It must be specified that literature on image recovery generally considers the recovery of a destination's image after a crisis or disaster to be a process (Avraham and Ketter, 2016). However, recent calls for research have suggested "*explor[ing] the interplay between mainstream and social media in terms of the role that public commentary can play in mitigating the negative perceptions caused by sensationalist media reporting*" (Walters et al., 2016: 15), stressing the role of social media in influencing negative or positive perceptions of a destination not on the basis of a particular event but feeding an online trend, as happened in the case study discussed in the following pages. In addition, other scholars highlighted the key role of social media in restoring the positive image of a destination. For example, in June 2014 the Kenya Tourism Board launched a social media recovery campaign with the hashtag '#WhyILoveKenya', encouraging tourists, residents, and tour operators to 'tell the world about the uniqueness of the country and how tourism business activities are ongoing despite the travel advisories' (Kenya Tourism Board, 2014) by sharing comments, pictures, and videos (Avraham and Ketter, 2016).

Tourism Destination Competitiveness

The debate over territorial and destination competitiveness effectively started in the early 2000s (Pike, 2004), when the journal *Tourism Management* launched a call for research on the topic (Tourism Management, 2000). However, one of the first—and still one of the most significant—contributions was provided by Ritchie and Crouch (1993), who developed a comprehensive model including all the factors affecting the competitiveness of a destination: destination appeal (attractiveness and deterrents), destination management (marketing and managerial efforts), destination organization (DMO capabilities, strategic alliances), destination information (internal management information system, research capabilities), and destination efficiency (integrity of experience, productivity) (Ritchie and Crouch, 1993; Buhalis, 2000; Mihalič, 2000).

In addition, scholars such as Bojanic (1991) and Pearce (1997) proposed the concept of *competitive advantage*, through which it is possible to build the destination image and compete on the tourism market because of the ability to attract a specific segment of tourists. In this regard, Bojanic stated that "*Destinations (…) must build their images around unique attributes that provide them with some kind of competitive advantage. Tourist attractions should be designed for that particular segment of tourists whose needs are best satisfied by the offering. Diagnosis of a destination's strengths and weaknesses in relevant attributes is helpful in planning tourism facilities and creating marketing programs*" (Bojanic, 1991: 352).

Thus emerges the relevant role of local resources—or, to cite Bojanic, attributes—able to differentiate the offer of a specific destination. When talking about territorial resources and competitive advantage (Barney, 2001), several models or approaches can be mentioned, such as the resource-based view (RBV) or the VRIO framework (Barney, 2001).

Both the former and the latter are based on the idea that resources, to generate a competitive advantage, must represent a value for local tourism development. More in detail, the VRIO framework is a tool to establish the value of each resource. Indeed, according to this model, a resource can be *valuable, rare, inimitable,* and *organized* (Barney, 1991).

Valuable means that, in line with the SWOT framework, the resource is useful in exploiting opportunities and/or neutralizing threats; *rare* means that most competitors are unable to obtain or use that resource (Barney and Zajac, 1994). *Inimitable* means that the resource is both valuable and rare and is costly to imitate; therefore, it is almost impossible for competitors to obtain the same advantage. In this case, the resource leads to a sustainable advantage because competitors are not able to replicate that attribute in the present and, most likely, in the future. Finally, to transform the value in competitive advantage, the resource must be organized—namely, properly managed and employed.

The identification of the factors that determine the destinations' competitiveness generated growing interest among both scholars and policymakers. In this regard, Pike (2004) suggested a categorization of destination resources representing sources of competitive advantage: developed resources (accessibility and infrastructure), financial resources (both private and public), legal resources (brand trademarks, licenses, and visa policies), organization resources (governance structure and policies; staffing levels, training, experience, skills, and retention; organizational culture; innovation; technology; and flexibility), information resources (marketing information system), relationship resources (internal/external industry integration and alliances; distribution; stakeholder co-operation; and political influence), and implementation resources (sustainable tourism development planning; brand development, positioning, and promotion) (Pike, 2004: 43).

In general, competition between destinations is related mainly to the constant change in the tourism market, due to the emergence of new destinations and, even more, to the new role of the tourist. The ability of tourists to affect the destination image and influence other tourists' preferences and perceptions, especially thanks to new technologies, inevitably affects strategies to develop and promote a tourism destination.

SOCIAL MEDIA IN DESTINATION MARKETING

Social media is being used in destination marketing at various levels due to the key role it plays in shaping interactions among multiple actors. Hays et al. (2013) set their analysis at a macro-level by describing how national tourism organizations use social media in their marketing strategies. The analysis they performed referred to various social media and was based on investment in online campaigns and on the multiple features of official online accounts, such as active users, time span of statistics, naming, frequency of messages, combined frequency of messages on different social media, and so on. The national organizations investigated acknowledged the need to have a marketing strategy in social media in order to increase destination awareness and tourists' engagement while avoiding the adoption of a spam approach and flooding customers with unnecessary messages. From a strategic perspective, communication through social media may represent a path towards the achievement of competitiveness or at least towards maintaining a competitive level in the tourism industry (Királová and Pavlíčeka, 2015). Moreover, the organizations recognized the relevance of social media even in the middle and long term, as engagement can convey loyalty and favour mutual learning, ultimately leading to customized messages and offerings. The efforts performed by national organizations and local firms when communicating via social media are motivated by the fact that effects seen at a micro-level are mirrored in the ongoing changes in tourists' decision-making process; indeed, tourism as an experience is shaped along a consumer decision journey, starting before the purchase of an offering and continuing due to the consequences of the experience (Hudson and Thal, 2013). These consequences expand beyond the individuals as tourists, as the desire to help others has been shown to be a key motivation for writing reviews and sharing them online (Munar and Steen Jacobsen, 2014). This is also mirrored in the content that tourists share, as they usually add visual elements to their text. Yet despite these consequences, marketing investment in social media is still limited, while efforts focus on achieving a return on investment in terms of image. In any event, scholars have suggested expanding the focus of the analysis to include social media users and their responses in order to acquire a more complete understanding of how interactions are shaped and mediated online (Hudson and Thal, 2013), in line with the previous insights provided by Xiang and Gretzel (2017) to favour the identification of what requires attention and to depict technology-mediated dynamics in tourism relations. A few years later, the dynamics became more evident to both scholars and marketing specialists (Tham et al., 2013) when evaluating the dimensions of e-word of mouth in social media for macro-destinations. The dimensions affecting tourists' perception of online messages, and making those messages different from that of traditional media, are the relationship between source and receiver, channel variety, the solicitation of information, message retention, and motivation for sharing information. The focus on online relationships and channels led to an investigation of engagement (Cabiddu et al., 2014; Thakur, 2018). Engagement through social media is based on interactions activating an action-reaction process; this continuous flow of information and decisions takes place in firms—among social media managers and marketing specialists—as well as between a destination and its tourists. Therefore, a relevant element emerges in these interactions, namely, affordance (Cabiddu et al., 2014), the opportunity to have actions and reactions depending on the intersection of organizations and individuals through technology. More recently, the effects of engagement on tourists have not been limited to interaction, but include identification, enthusiasm, attention, and absorption, as in the analysis by Harrigan et al. (2017). More in detail, identification leads tourists to feel part of what a tourism image represents, while enthusiasm creates excitement among consumers and increases their interest in a destination. Absorption describes the behaviour of a tourist deeply involved in his/her role as consumer, while attention depicts how focused a tourist is when connected to a destination image. The five effects are useful in shaping customer engagement as a behavioural, emotional, and cognitive process. More recently, an empirical analysis led Thakur (2018) to describe customer engagement as affecting the online review intention and the intrinsic enjoyment of a destination. Moreover, engagement impacts the monetary evaluation of a tourist experience and is affected by both customer satisfaction and trust in a service provider.

To sum up, most of the attention in the area of communication in tourism is being paid to social media and some questions are still open. Lund et al. (2018) called for additional research on the wide array of agents impacting on online discourse on tourism destinations, as most of the research addressed 'normal users' and their messages instead of analysing multi-actor interactions. Similarly, Dewnarain et al. (2019) stated the need to investigate online interactions in order to provide guidelines to social media managers in the tourism industry, thereby allowing them to tackle unpredictable situations and forge additional relationships.

RESEARCH PROCESS

This chapter aims to depict the dynamics of an online debate over a geographical area to identify how multiple interactions over social media can affect the image and competitiveness of an area as a tourism destination. The online debate will be analysed by considering multiple sources and multiple actors to grasp additional meanings from various stakeholders shaping an online debate. Moreover, the use of multiple sources will help avoid the bias that would arise through the selection of one single source affected by specific features (and, thus, limiting the scope of the analysis). Similarly, the analysis will be longitudinal to track the stages of the debate and highlight the actions and counteractions that occurred online. Finally, a multi-level structure will be adopted to consider actors based on their typology and to highlight the differences among typologies. Consequently, this section will describe the research aim, the research approach, the research context, and the methodology shaping the analysis.

Aim of the Research and Research Approach

The literature review proposed above showed a growing interest in the ties among destination marketing, destination image and competitiveness, and social media, as the latter is offering new opportunities to create multifaceted interactions (Hudson and Thal, 2013). Competitiveness among tourism destinations (Pike, 2004) is moving the battlefield online at various levels, as national organizations (Hays et al., 2013), firms (Tham et al., 2013), and other actors (Cabiddu et al., 2014) convey offerings through social media to create engagement (Thakur, 2018) as their main aim. Such an action can steer customers' preferences (Harrigan et al., 2017) and improve destination image and competitiveness (Wu and Yi-Kuan 2005; Shen et al., 2015; Fernando et al., 2016). However, various scholars have called for further research, as additional elements remain to be clarified about how social media can affect a destination, due to three main issues, namely, (a) the novelty of the topic and the multiplicity of actors shaping the online debate (Teixeira and Ferreira, 2018), (b) the need to expand the scope of the analysis beyond 'normal users' as tourists are (Lund et al., 2018), and (c) the interest in providing suggestions to social media managers when dealing with out-of-the-ordinary situations in the tourism industry (Dewnarain et al., 2017). Thus, this research aims to depict the actions and reactions shaping the debate in online sources through a multilevel approach. Some of the main elements of the analysis are the actors' behaviour, the content of their messages, and the online contexts hosting the debate. Therefore, the depiction of such a context aims to identify how actors can contribute to the shaping and re-shaping of the image of a territory to reinforce or challenge the main trends of an online debate.

Therefore, the authors adopted an approach embedding all actors while simultaneously describing the actors involved at different levels; this may lead to strive to achieve a better understanding of their role in the communication dynamics in social media about destination marketing.

Due to this premise, a multi-level approach based on the macro-level, meso-level, and micro-level can be helpful in identifying two main pieces of evidence, namely, (a) the actions and reactions of levels of actors and (b) the interplay among categories. The former can lead to an evaluation of choices, approaches, and the engagement of actors belonging to a certain level, while the latter is helpful in describing effects in a community, from a B2B perspective, from a B2C perspective, and in relationships involving governmental agencies.

Additionally, the use of a multilevel approach is not atypical in tourism studies, as it was in the contribution by Williams et al. (2017) when analysing e-word of mouth, and by Wäsche and Woll (2017) when dealing with networks in the tourism industry.

Besides the missing agreement among scholars on what the three levels mean and whether it is necessary to consider an additional model, the authors considered these levels in the following way:

- Macro-level, the entire tourism system
- Meso-level, the community shaped around tourism
- Micro-level, the basic interactions directly involving tourists as consumers and service provision.

Research Context and Methodology

The research context chosen for this chapter is set online, as the debate took place as a back-and-forth interaction in online contexts, with multiple websites, blogs, social media pages, and other minor online channels, acting and counteracting with reference to the existence of the region. The action-reaction process in social media in tourism studies has already been stressed as relevant (Cabiddu et al., 2014; Gretzel, 2017). However, an empirical focus on the interplay among the actors is missing. Moreover, to merge the attention on this interplay with an unexpected situation (Dewnarain et al., 2017) and through the application of a multi-level approach (Chim-Miki and Batista-Canino, 2018), the authors chose to analyse the online debate on “Molisn’t”. This online trend started as a tongue-in-cheek discourse on the non-existence of an Italian region, named Molise, and led to the creation of a word summarizing this concept as “Molisn’t”. This back-and-forth discourse dates back to 2011 and is still ongoing. The authors collected data from various sources through a search engine, social media links, and references recalled in offline contexts. An overview of the sources used in this research is offered in the following table (Table 8.1). Finally, data analysis took place with the authors acting together to avoid bias depending on subjective views on a topic and to favour a common interpretation of sources.

Due to the main features of the research context, the authors chose to perform a netnography, as it allows for the use of information publicly available online and to grasp meaning by adopting a naturalistic and unobtrusive approach (Kozinets, 2010). This choice depends on the advantages of analysing a personal and cultural understanding of the online debate that would be difficult to capture using software, such as for content analysis or social network analysis. Therefore, the research process aligns with the steps suggested by Kozinets (2010), namely, the research goals were defined and the wide community shaping the debate identified. Then, after collecting data, the authors analysed the participants’ online behaviour in social media pages, blogs, and other websites (i.e., blog articles, posts and comments on social media websites, articles in online journals, photos and videos shared online) to interpret the online debate. Data analysis was aimed at identifying categories of behaviour—namely, the content of online messages—to be analysed through the main element shaping the research approach, viz. the three levels of the research approach, and the action-reaction process suggested by tourism scholars (Cabiddu et al., 2014; Gretzel, 2017). The analysis continued until saturation was reached—namely, emerging topics were not new and did not add new insights to the research (Kozinets, 2018). To sum up, saturation was achieved after the analysis of approximately 300 posts on Facebook with around 850 comments, 100 tweets with about 240 comments, 50 posts on Instagram with more than 250 comments, several newspapers articles published online, various videos, and almost 45 minor webpages and blogs.

Finally, the identification of netnography as a suitable method for this research depends on previous usage in tourism studies and on the advantages scholars highlighted, such as the capture of individuals' perspectives on a specific issue (Mkono, 2011), the focus on topics until new ones emerged (Podoshen, 2013), and the analysis of the true meaning (Rageh and Melewar, 2013) in the action-reaction process, even because of the humoristic side of this debate.

FINDINGS

The netnographic analysis of the multiple sources previously selected led to the identification of six categories describing the behavior of various actors involved in the online debate on Molise and its tongue-in-cheek non-existence.

The categories were created by crossing three levels representing the multifaceted context and the actions and reactions depending on comments, videos, pictures, and so on, published on online sources (e.g., social networks, online sharing platforms, forum and blogs, websites, and online newspapers).

Each category was shaped on the basis of four elements, namely, the typology of actors, the online context, the content of the message and its structure, and the sentiment embedded in the message itself.

Even if the authors focused on time as framing the messages and the attitude of the actors, results were not affected by time apart from an increasing number of occurrences and sources, especially in the last three years.

The first two categories included actors classified at the macro-level. As stated above, the trend was launched and grew up mainly on social media. Therefore, it was propagated by single users and communities. However, as time went by, institutions started paying attention to this social phenomenon, even if there were very few examples to mention. In detail, actors belonging to the first category aim to create awareness of the uniqueness and richness of the region in order to promote it as a tourism destination or to support the development of tourism in Molise.

For example, the official Twitter account of Milan's Expo 2015 shared a picture of the standing of Molise to show people attracted by local products with the hashtag #moliseesiste (#moliseexists), while the University of Molise launched a survey on the tourism image of the region, entitled "Molise Exists". Additionally, the University of Molise arranged an event in 2018 to present two books dealing with the topic of the region's existence versus its non-existence. The book dealt with the landscape of the region by sharing stories and emotions through a trip across the region.

The second category stemmed from the reactions of actors classified in the macro-level; this category was named "counteracting to promote", as the authors identified actors' messages as seeking to promote Molise in the face of the ongoing trend. These efforts took place mainly as a means of increasing awareness of the local heritage.

Unfortunately, no relevant counteractions by actors classified at the macro-level were observed; this result aligns with the complaints of several actors calling for an intervention of institutional actors in promoting the region, establishing tourism programs, or identifying testimonials to improve the region's image.

Table 1. Sources and main features of data collected

Source and brief description	Type of data	Actors posting/debating on the topic	Data horizon
Social networks			
Facebook pages "Molisn't - Io non credo nell'esistenza del Molise"; "Il Molise non esiste"; "Il molise esiste"	Posts, comments, and images	Administrators and users	From late 2013 and late 2014 to present
Instagram	Images and comments	Administrators and users	From late 2015 to present
Twitter: a community profile and the hashtags #Molisn't #molisenonesiste #moliseesiste	Posts, comments, and images	Users	From 2011 to present
Online sharing platforms			
Nonciclopedia, a fake online encyclopedia. Page in a fake book, "Dimostrazione dell'inesistenza del Molise"	Information and images	Contributors	From 2014 to present
YouTube, video sharing platform; videos on Molisn't	Videos and comments	Users	From 2013 to present
Forums and blogs			
Altervista, hub of webpages; pages on Molisn't	Text and photos	Administrators	2015
Evensi, a website promoting events	Text and images of a fake event	Proposer and users	2016
Forum community: hub of forums; page on Teamolisnt	Various threads	Users	From 2015to present
Minecraft Italia, a forum about an online game; Page on Molisn't	Text and comments	Administrators and users	2015
Primo Piano, an Italian blog; pages on Molise	Posts and links	Administrators	2015
Websites			
Let's dig again, web radio on archaeological heritage; debate over Molise heritage	Text, audios, videos, and photos	Administrator	From 2017 to present
WordPress, hub of webpages; page "Riscoprendo il Molise – Promoting Molise"	Text, videos, and photos	Administrator and users	From 2016 to present
Online newspapers			
Corriere della sera (newspaper online version); "Il Molise? Ho le prove della sua (non) esistenza"	Newspaper article (text and photos)	Administrators	2016
Financial Times (online version of a US newspaper); articles on Molisn't and Molise	Newspaper articles (text and photos)	Administrators	2018
Il Fatto quotidiano (newspaper online version); debates on Molisn't and the missing reaction by local agencies	Newspaper articles (text, links, and photos)	Administrators	2015
The Local (online newspaper); page on #moliseesiste	Newspaper article (text, links, and photos)	Administrators	2016

The third and fourth categories were related to the actions and reactions of communities of users, such as local associations, social network groups, webpages, social network accounts or pages, or online newspapers.

Actors belonging to the third category act to attract single users by creating a sense of fun over joining the online trend, mainly through videos, pictures, or the sharing of news.

It must be underlined that the approach of the communities was either ironic (recalling the humoristic trend with hashtags such as #molisn't or #molisnt) or serious but in a positive way (namely, to promote the region by showing its uniqueness and the richness of its local heritage).

With reference to the third category, the various social network accounts, groups, or pages confirm and feed interest around the trend. Some relevant examples are listed below.

- *Molisn't – I don't believe in the existence of Molise,* Facebook page with more than 69,000 likes;
- *Il Molise non esiste*, Facebook page with more than 14,000 likes;
- *Il Molise esiste*, Facebook page with about 6,000 likes;
- *Molise is not real,* Facebook page with almost 4,000 likes;
- *Molise on YouTube,* YouTube account with 1,500 users;
- *Molisn_t*, Instagram profile with more than 1,000 followers;
- *People from Molisn't*, Facebook public group with 115 users.

Finally, another example showing the relevance of the phenomenon is an article in the Financial Times, published in 2018 and mentioning the trend and a web page organizing fake events in Molise.

The fourth category was groups of actors belonging to the meso-level, counteracting the trend by taking advantage of the jokes to defend the region or even promote it.

An example is a web page promoting some areas of Italy (among them, Molise) and entitling a section "Molisn't", thereby acknowledging the humoristic trends while also promoting the region.

Other examples worthy of being mentioned are articles in popular local and national newspapers, both online and in paper, directly answering the question "Does Molise exist?", as in the quotes below:

Molise exists, but national institutions forgive it. [an article published in an online local newspaper in 2015]

Molise? I have proof of its (non-)existence. [an article published in a national newspaper in 2016].

The description of the third and fourth categories led the authors to assume that the actors involved were seeking to defend or even recover the image of Molise and to indirectly propose it as a tourism destination, even using an approach that can be considered bottom-up, as it is not the result of a local tourism development plan.

The fifth category contained all the actions of the actors classified at the micro-level; this category was named "having fun and standing for" because most of the authors of the messages were writing to joke about the non-existence of the region or, conversely, to state its existence by providing some "proof "such as a picture or newspaper article. The actors shaping the content of this category were mainly single users acting on social networks, sometimes with short messages or images to recall the main trend launched almost 10 years ago and hashtagged as #molisn't, #molisnt or, on the other hand, #moliseesiste. An example is offered in the following quote:

Why are people talking about the results of elections in Molise? It doesn't exist. [a tweet posted on April 23rd, 2018]

This tweet is based on Molise's relevance in national elections; it has a limited number of inhabitants (lower than most of the big and medium-sized cities in Italy) but has regional representatives appointed at the national level. Moreover, this tweet led to various comments pertaining to the sixth category, which will be described further.

Most of the messages in this category contained one of the two hashtags mentioned before and claimed the non-existence of the region based on some of its features, such as its size, the lack of historical attractions, the impossibility of recalling someone famous from Molise, and so on. Sometimes, these messages were complemented with images aimed at being funny, such as an empty space, a representation of black holes in space, maps of Italy with Molise replaced by the sea, and even maps of weather forecasts were Molise was not included at all.

On the other hand, it must be stated that, while being few in number, some users declared the existence of Molise, opposing the main trend. This kind of message was published mainly on Twitter and Instagram. For example:

Molise exists and is a beautiful region. [a tweet posted on August 18th, 2018]

Due to the multimedia content of these messages, social networks are the most suitable context for hosting them, as social media makes it easy to share a brief message, partner text with images, and follow the main trends represented by hashtags. Quite surprisingly, Instagram was not frequently used for funny statements, while Facebook and Twitter were; instead, Instagram was often used to show what the region can offer, with photos of beaches, historical attractions, food, and natural sites.

Finally, the messages often used fantasy words or extreme comparisons to emphasize the alleged non-existence of the region. One example of such content is the tweet of a singer watching a concert on TV:

There are more people at the concert I am watching right now on TV, than inhabitants in Molise. Oh, wait, sorry, Molise doesn't exist.

This message led to several criticisms, as several of the singer's followers read the message. People fighting against this trend perceived the message as particularly effective in spreading the joke.

As in the previous case, the sixth category grouped the reactions of single users acting mainly on social networks. Reactions could have both a humoristic approach and a serious, or even angry, approach to defending the heritage of the region and recovering its image. As concerns the latter, users acted to promote the concept of fun, for example, by sharing videos, pictures, or posts from someone else, adding ironic comments (as in the following example), or simply tagging other users.

This picture doesn't exist. [a comment on a picture published on Facebook on July 30th, 2015]

The reactions in protest were very few in number compared to the humoristic ones and were mainly textual; in fact, unlike the reactions to promote fun, it was quite rare to find tags or pictures reacting to protest.

I exist, my region exists (...) It is very bad to be told 'What is Molise? ''But does Molise exist?' I have had enough. [a comment on a video published on YouTube on July 30th, 2015]

Table 2. The six categories emerging from the netnographic analysis

	ACTIONS	REACTIONS
MACRO-LEVEL	**CREATING AWARENESS**	**COUNTERACTING TO PROMOTE**
MESO-LEVEL	**CREATING FUN**	**COUNTERACTING TO DEFEND**
MICRO-LEVEL	**HAVING FUN AND STANDING FOR**	**AMPLIFYING FUN AND PROTESTING**

Source: Authors' elaboration

In general, reactions (both humoristic and serious) were shared mainly on social networks such as Twitter, Facebook, and YouTube.

To summarize and wrap up the analysis of data, the following table is proposed (Table 2), aiming to show the two drivers used to categorize the evidence and the six categories derived from crossing the variables.

DISCUSSION

The findings derived from the analysis of data collected through a netnography showed actions and counteractions in the debate over a territory as a multi-actor process. Local inhabitants, Facebook users, bloggers, media, and scholars (both local and not) shaped a long debate to counteract or join the negative side of the messages describing Molise as a non-existing territory (Shen et al., 2015). Most of the actors counteracting this trend were afraid of the negative consequences of such messages, which they felt would greatly—and negatively—affect local activities and the attractiveness of the territory. Indeed, to show what Molise can offer, most of them referred to local heritage, natural sites, the history of the villages in the region, and food traditions (Neto, 2007).

The results were useful in achieving saturation, as no new topics emerged from the analysis after the considering of hundreds of messages or other sources. Though the nature of this analysis is qualitative, it must be said that messages belonging to the first two categories were very rare compared to the other four, especially because of the large number of actors using social media and following the main trends launched through and supported by hashtags and dedicated webpages. Finally, the last two categories were the only ones hosting actions and reactions contrasting one another, as the debate was shaped around two main trends: the pretended non-existence of the region and the claiming of its existence, plus the opposing answers of other users.

Therefore, the counteractions shaped a multilevel approach to the debate over the territory, as reactions have been observed as originating from political institutions, the media, and single individuals. Moreover, all reacted in a similar manner—namely, to leverage historical and tourism-oriented features to make the region more interesting (Teixeira and Ferreira, 2018). They promoted their own territory to enforce the region's image and to recover its image after a social trend led to a negative effect.

The online debate emerged as a combination of two main trends—the first (and oldest) one pretending to claim the non-existence of the region and the second seeking to challenge this propensity, while acknowledging that the sole aim was to have fun. Actors shaping the second trend were mostly afraid of the message arising from the original trend, as the region appeared to offer nothing. They identified the need to fight this idea and they did it on their own, parallel to stating the need for an institutional action to promote the area. Finally, many of the individuals reacting to the fake campaign on the web showed that they were proud inhabitants of the region, especially when they combined images of their region with curse words aimed at the social media users attacking the region's image.

IMPLICATIONS

The present study analysed multilevel communication on social media about a destination and its image. The region framing the debate is Molise, as the tongue-in-cheek online image of this region is that it is non-existent due to its small size, the fact that it is the most recently established region in the country, and the fact that it contains few attractions for tourists—attractions that are badly and only occasionally promoted. What emerged as partnering attractions and the usual core elements of a destination is awareness, as theorized by Fernando et al. (2016), but this was hardly ever considered in empirical research as affecting the participation in a multifaceted debate.

Interestingly, local attractions are among the key topics in reacting to this trend, a feature that frames this research in destination marketing studies due to the relevance that attractions have in destination studies (Cooper, 1993; Holloway, 2006). Therefore, researching social media can represent a concrete focus of tourism studies, as advocated by Teixeira and Ferreira (2018) and can affect a destination's image (Bellini, 2004; Neto, 2007; Martínez-Ruiz et al., 2018) as a debate constructed by multiple actors.

The three levels of analysis – macro, meso, and micro – are mutually influencing, as actions and reactions take place at various levels; this depends on the role that social media plays in engaging several actors in a debate due to the availability of interacting tools with no limits on space and time. This led to a consideration of the actors reacting as though they were worried about the consequences of online debates over the image and competitiveness of a region, regardless of the role they play in—or for—the region, as reactions came from individuals, associations, and other actors, albeit in different ways. Thus, first, the effect of new technologies and online contexts on the destination *image building* (Wang and Law, 2013; Shen et al., 2015) is confirmed even more, though further understanding is added and new questions for additional research emerge. More in detail, the effect on destination preference should be observed to consider the framework proposed by Lin et al. (2007) and to obtain more insights into how social media can affect tourists' decision-making process. Second, the studies on *image recovery* (Saraniemi, 2011; Ryu et al., 2013) may be integrated by this analysis and described as a multilevel approach, as the actors at different levels joined the debate on their own and as a consequence of their willingness to participate.

The contribution of this research is framed in the debate over the recovery of image (Avraham and Ketter, 2017), even if from a different perspective, as the negative event being challenged is a fake campaign aimed at being funny and not a natural disaster or another real event. Moreover, this research aligns with the previous understanding of the social media debate as taking place at different levels (Hays et al., 2013; Tham et al., 2013; Králová and Pavlíčeka, 2014; Harrigan et al., 2017). However, in this case, the various levels are mutually influencing and interacting. Thus, the results proposed in this chapter answer the call for research by Lund et al. (2018) to shift the focus beyond 'normal users' as tourists, as the three levels scanned the entire set of actors participating in the online debate.

On a practical side, the awareness of various actors in understanding the need to support their territory and its image represents a two-fold suggestion for policymakers, as they should engage in actions that seek to combat the negative image of their region; when doing that, policymakers and local institutions can favour the improvement of the image by calling for the support of local inhabitants, who care about the area they live in and the image that others perceive. The call for guidelines and suggestions (Dewnarain et al., 2017; Tregua et al., 2018) led the authors to stress the need for taking additional care of the online debate, as local actors at all levels perceive social media as actually affecting the image of a territory with potentially negative consequences in terms of competitiveness. Therefore, social media managers—and local actors, especially institutions, asking for their services—should identify ongoing trends in the online debate and challenge them (when negative) through the use of proper interventions leveraging the engagement of actors (both local and not) to benefit from their creativity, their sense of belongingness, their knowledge of the territory, and the wide scope of relations they can activate.

CONCLUSION, LIMITATIONS, AND FURTHER RESEARCH

The netnography analysis applied to the contributions of different categories of actors led the authors to pinpoint some key elements in the online debate over the existence of Molise.

First, the variety of actors participating in the debate was classified on the basis of three levels—namely, macro-level, including the members of local associations and administrations, meso-level, including communities, and micro-level, including single actors such as citizens and people living out of the region.

The analysis has been conducted also taking into account the time span, even if relevant peaks were not depicted.

Most of the debate started in 2015 with the creation of a Facebook page and the sharing of videos on YouTube stating that the region doesn't exist; however, the first comments date back to 2011 and appeared on Twitter. The statements, even if obviously fake and aimed at having fun, were shared with further clarifications, which were as fake as the statements. In detail, people justified their hypothesis regarding the non-existence of Molise by highlighting the absence of a relevant historical heritage, the lack of famous people from the region, a shortage of typical products, and the inability to recall brands or sporting events from Molise. The peak of this trend was achieved when a "fakopedia" launched a page to support a debate against the existence of Molise. This made the phenomenon a significant trend online and people from the region started reacting. More in detail, local residents started asking why such a debate should go on. They felt insulted and someone launched a call for a testimonial aimed at promoting the region.

As time passed, both local and national media, as well as politicians at the national level, reacted against the joke to create awareness and promote the region.

It is still not possible to measure the effects of this phenomenon, whether positive or negative, because trends have been launched and carried on mainly by single users without any official control.

The main limitation of this study is represented by the difficulties involved in depicting all the contributions and selecting the significant ones. In this regard, future studies on the topic can be performed using software to conduct a content analysis. Moreover, interviews with local actors in the tourism industry and with institutions can help track the origins of the debate and obtain insight into the awareness of these actors and the reactions (including the missing ones).

Furthermore, despite some less relevant initiatives recalling the trend of Molisn't (such as *Basilican't* or *Australia doesn't exist*), there are no comparable phenomena with which to carry out a benchmarking. Thus, similar trends can be monitored to conduct a similar analysis and verify whether future comparable trends would be equally spontaneous or driven by a higher-level actor to take advantage from a marketing perspective.

Further research can also help verify whether the phenomenon can be leveraged to promote local tourism development.

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Chapter 9
Tourism in a Salt Pan:
Does Creativity Matter?

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ABSTRACT

The production of salt has always been part of human life. Salt natural sources may vary from rock mine to marine water. Some places have developed their economy considerably due to the extraction and trade of this raw material. More recently, traditional sea salt production activities have been attracting attention from a diversified range of the public. Traditional salt producers usually focus on production, but as a result of tourist demand for visiting salt production activities, producers must develop the intention to receive visitors. Such reception not only shows visitors the activity, but serves as an advertisement to international markets likely to add value to such an ancient, fundamental good: salt.

INTRODUCTION

The production of salt has been related to human life from its beginning. Since ancient times, salt has been used for preserving food, seasoning or pharmaceutical products, and applied in the production of many daily commodities (Kurlansky, 2011). Thus, from early times salt has had utilitarian value. Salt is still one of the preferred and the most widespread methods used in the preservation of food (Bjørndal et al., 2016). Notwithstanding the unhealthiness of excessive and regular intake of salt, it has been recognized as having therapeutic utility, particularly in the context of thermal treatment (Merson, 2004). Salt can be extracted or produced out of several sources: mines, lakes, lagoons, ponds, as a result of natural processes or man-made. Extraction processes have been twofold: handmade or industrialized.

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People seek entertainment and novelty during their free and leisure time (Crompton, 1979). When people become tourists (Binkorst & Den Dekker, 2009), whether in winter, summer or midseason, they can go abroad seeking to relax, to find a different culture, to get involved in different experiences (Vittersø et al., 2000). Culture is sought by tourists who like to visit historic sites and heritage (Richards, 1996). However, they also pursue other forms of interests and recreation. Tourism providers thus tend to adjust tourist demand and propose experiences matching these alternative wants and expectations (Richards, 2002). Multiple offerings become available in the market following successful experiential proposals, but tourists will always choose what they perceive as the best recreational option (Walliss and Kok, 2014). Under such competitive conditions, only the selected few will remain operating in the market.

Apart from the traditional thermal use of salt, sites where production of salt take place have recently been attracting the attention of tourists. Either because of the attractiveness of natural landscapes associated to salt production (*saltscapes*) (Petanidou and Dalaka, 2009), or of the cultural heritage linked to the traditional ways of salt production. It is acknowledged the growing interest in these out-of-the-ordinary landscapes, both for learning and recreational purposes (Wu, Xie & Tsai, 2015). All around the world there are various forms of attracting tourists to visit different types of salt production (mine, volcanic, sea water).

Attractiveness of places is becoming increasingly linked to intangible factors found in atmospheres and activities, and creativity is part of the process of getting visitors involved in salt production (Richards, 2010). New tourism products and experiences can be developed under this logic (Richards & Wilson, 2006). One way to attract and involve people in the salt theme is by providing them different places to visit. Cultural salt routes can be found in different locations around the world. One of them links four European countries through a path crossing Germany, the Czech Republic, Austria and Italy (Jarábková and Hamada, 2012). Destinations scarce in coastal areas but rich in saltern areas are challenged to creatively produce salt under the sustainable tourism framework. One such case is to be found in Sečovlje Salina Nature Park in Slovenia (Faganel and Trnavčevič, 2012). In Portugal, some traditional salt pans are presently available to tourist visitation (Ramos et al., 2019). Traditional sea salt producers eventually expanded their business to other economic areas, and a multilevel approach has been developed (Feng et al., 2014). Salterns are particularly hard environments, however specific natural features are better understood as advantages rather than taken for granted attributes (Duxbury et al., 2018).

This book chapter introduces the reader to iconic salt production places around the world which are also tourist attractions. Then traditional salt pan environments are briefly described. A third section focuses on salt tourism and tourist experiences in these specific areas. Different typologies of tourism are then identified and described in a way they can be developed in a salt production setting. The chapter concludes with managerial implications and recommendations to tourism providers and developers.

SALTSCAPES AND SALT PRODUCTION PROCESS

Some iconic Places Around the World

Since early days, salt has been part of human culture and used as a means to food preservation and as a mode of payment for labor. *Salary* is a term that originates from the Latin word for “salt” and can be traced back to roman times (Pittia and Antonello, 2016). Around the Mediterranean basin many countries produce salt since antiquity (Lane and Morris, 2001). The *Via Salaria* is a road purposely built by the

Romans to transport salt (Círillo et al., 1994). Their legacy to posterity can be found to this day, as salt pans remains can be seen in many places, as for example: Cheshire (England) (Gittins 2005; Lageard and Drew, 2015), Loire-Atlantique (France) (Thompson, 1999; Galvis-Sánchez et al., 2013), Sado river estuary (Portugal) (Ruano, 1997), Galicia (Spain) (Brión, 2010), Guadiana river margins (Spain and Portugal) (Hocquet and Hocquet, 1987; Ménanteau et al., 2005).

In South America, particularly in the Andes area, there are iconic salterns. One such area can be found in Maras (Peru), where solar salterns fed from springs are active since the Incas (Maturrano et al., 2006). Salar de Uyuni (Bolivia) is another prominent attraction. This Salar is simultaneously the largest flat and is located at one of the highest altitudes where solar salterns can be found. The site attracts tourists from all over the world. Tourist accommodation, such as hotels, is built with salt materials and furniture made of salt slabs and blocks (Rael and Fratello, 2018). In Central and North America, wooden architectural remains of Maya saltworks can be found in a lagoon in Belize (Somers, 2007; Murata, 2011). Lake Texcoco in Mexico bears witness to the importance of the Aztec salt production in the economy of the time (de León, 2009).

In Africa, the Baleni spring (South Africa) presents archaeological evidence of ancient salt production (Antonites, 2013). Salt has been used in several burial rituals since ancient times (e.g. Egypt) (Círillo et al., 1994). By then, in many places salt was quarried by simple digging out of the ground (North Africa) (Bloch, 1963). Trading of salt developed across the desert in central routes (e.g. Sudan) (Lovejoy, 1986).

In Asia, ancestral boiling methods are used to produce brine. For instance, in China there is evidence of ancient salt making techniques using flame (Cui, 2010) and archaeological findings attest ancient salt production and social hierarchy in the Sichuan Basin (Flad, 2011; Raad et al., 2014). Some remote methods consist in pouring brine into salt wells to produce salt (Thailand) (Yankowski and Kerdsap, 2013).

Some salt production sites, due to their link to history and development of people settlements, have been considered cultural heritage sites (Martorell Carreño, 2003). Those sites attract many visitors worldwide. Interest in travel to salt producing areas is closely linked to the fact that salt is a resource embedded in the history of humankind on the planet.

Natural Setting of Salt Producing Areas and Business Competitiveness

Business firms compete against each other through their offerings. Winning firms are those that best serve customer's needs, as their satisfaction is higher (Roy et al., 2009). However, customers have different needs and satisfaction levels (Hu et al., 2009). Finding customer niches and addressing very specific needs may represent a competitive advantage in a highly competing environment (Robinson and Novelli, 2005). More and more, people seek natural settings with impressive landscape to visit (Zhang and Lei, 2012). Nature tourism is increasing, particularly for those tourists that seek an escape from routine in urban atmospheres.

Petanidou and Dalaka (2009) have defined *saltscapes* as "landscapes with a long-lasting salt-making activity, thus embedded with a blend of salt-related characteristics that marked them physically, ecologically, economically, and culturally." *Saltscapes* such as the traditional salt pans are an option for those people that want to relax and get away from daily routine of the city (Rodrigues et al., 2015).

Countries with a coastal sea in a mild or tropical climate could offer salt tourism by taking advantage of a natural landscape where traditional working activities have been developed through the ages. In Europe, Atlantic or Mediterranean destinations have explicit awareness of the role of attracting visitors to traditional salt pans, thus proposing a diversified range of cultural, natural and relaxing activities alongside with pleasant landscapes. Another example is found in Namibia, where salt pans in the deserts are increasingly sought for geo-tourism purposes (Bliss, 2018; Dowling and Grünert, 2018).

High salinity basins offer visitors unique multisensory experiences and peculiar floating sensations (Parise et al., 2015). Due to the increasing number of potentially tourist areas and diversified offer, many of those salt experiences boost traditional businesses competitiveness with potential spillover effects in regional economies. Business competitiveness is positive and sustainable if visitor's needs are served and there are opportunities to learn, enjoy and improve their wellbeing.

Marine Salt Production: Brine, Coarse Salt and Flower of Salt

Sea salt or marine salt production is such that uses seawater evaporation in a gradual process until saturation. There are alternative methods for marine salt production. In locations where salterns have low economic value, land is used to other purposes, and salt production is then compensated by desalination plants (Wang et al., 2015). In order to produce fresh water, desalination plants dispose of large amounts of concentrated brine that can be used for accelerating the process of coarse salt production in conventional salt ponds (Cipollina et al., 2012). Several methods of marine salt production can be found in different continents, using different approaches and tools for the same proposal.

Despite being mentioned and known since ancient times, only recently the flower of salt became a sought-for and traded good (Brock, 2016). Pliny The Elder named it *flos salis*. Recently, the flower of salt gained visibility through French production originating in Guérande, Camargue and similar places. Other countries, mainly located in Southern Europe, stimulated by increasing demand for this commodity, started investing in its production. The flower of salt is usually produced in mild weather conditions (Harding, 2013). Even at higher latitudes, it can be found the Maldon salt, which is basically composed of sea salt flakes, resembling flower of salt (Kilcast and Den Ridder, 2007).

In addition, the differentiation of salt into coarse salt and flower of salt has been revitalizing slowly the traditional activity of sea salt production (Evaristo et al., 2008). Flower of salt labor is usually better paid than traditional coarse salt labor, due to the higher value attached to the product flower of salt in the international market (Rocha et al., 2012). Tourism activity also helps to increase product value, as tourist demand boosts local trade focused on salt and the delivery of tourism related services. Tourist activities can be as simple as finding the locations where flower of salt is an attraction (Nogueira et al., 2014) and endeavor to select the most appealing one: the whitest, the cleanest, the most pristine, and so on.

TOURISM IN SALT MAKING SITES

Salt Tourism

Salt tourism is a recent type of heritage tourism, which includes "tours in the salt fields, participation in the salt production process, and the purchase of salt-related products" (Wu et al., 2015: 201). Some research reports the variety of activities that can be performed by visitors in salt-based environments, accommodating diverse visitor profiles, interests and capabilities (Różycki & Dryglas, 2017; Mandelartz, 2018). The heritage, the learning, and the recreational experiences may include visits to museums, interpretation centers, participation in events, photographing or sightseeing (Wu et al., 2015; Sainz-López, 2017; Hsu, 2019).

As part of traditional industrial production, salt tourism has in common with heritage tourism the focus on tangible remains, buildings and architecture, agricultural fields and alike. However, as tourists are becoming more participative and yearning for hands-on-approach, promoters and other stakeholders are using this type of tourism to build destination attractiveness and competitiveness, but also sustainability. In fact, salt tourism is believed to partake in the sustainability mindset, by supporting "the protection of the environment and the social and economic development of the region" (Mandelartz, 2018: 38).

Space, Season and People

Solar evaporation salt making sites are usually composed of a salt pan production area, where environmental conditions are usually harsh. High exposure to the sun is a requirement of the production process. Usually there is an absence of trees, which leaves salt pan areas more exposed to winds. Large availability of saltwater is important. Therefore, saltmarshes are commonly found in such places and nearby fertile land or other areas are usually salty. There are two specific salty habitats that can be found in traditional salt production areas: the tidal creeks combined with marshes and the range of permanent water ponds presenting differentiated salinities (Sánchez et al., 2005).

In a traditional salt pan location, there are plenty of ample spaces, but partially covered by water. Such locations are not pleasant to visit during Winter, because even when the weather is good, the surrounding soil is muddy. During the warmer months, muds dry, and such places become more pleasant. In a salt pan, the main activity is salt production, so human resources are usually allocated to the production of salt commodities. Thus, with the increasing demand of tourists, some human resources are needed in the provision of tourism related services (Kortekaas, 2004).

A multilevel approach is important to maximize benefits to businesses, communities and visitors. From an inclusive perspective, some drawbacks that potentially impact on the sensitive natural environment need to be minimized, if not eradicated. Tourist presence must be controlled, and activities carried out in a way to avoid workers and local species disturbance, such as birds during their nesting period. The design and implementation of trails may help preventing such disturbance. The carrying capacity of tourist visits in salterns cannot be exceeded, otherwise it may put a burden on the environment, as well as jeopardize the balance between nature and human activities.

Not only the production labor based on salt-workers for coarse salt and light work on the flower of salt is needed, but also the provision of diverse tourism services, namely guiding, in which case knowledge on foreign languages and on biology or environmental sciences is required to enhance the tourist experience. Here hard and soft skills, as well as creativity are vital to the facilitation of memorable experiences in these unique settings. Hosting, educating and entertaining tourists is fundamental to match tourist's higher motivations and expectations, such as learning about salt pans.

Being a Tourist in a Salt Pan

Customers of a given product express the desire of visiting the production premises and processes, and some tourism is developed having that in mind (Bennett and Strydom, 2001). Archer et al. (2005) argue that when thinking about tourism is important to plan and manage experiences in a way that negative impacts are minimized, and positive impacts emphasized. Several factors can influence those impacts. For example, location is an important factor to consider. Remote places imply more time spent in travel for a short period of enjoyment. Areas not easily accessible may disturb larger groups of people, particularly if they use the bus as a means of transportation. Thus, to gather larger groups of tourists to visit salt pans in a natural setting is not the best option, because it may disturb the local fauna, namely waterbirds.

Recently, tourism has been included in the salt pan context. It has been recognized that in order to bestow value onto the commodity salt, tourism plays an important role. Therefore, some businesses have been adopting tourism as a complementary activity of coarse salt and flower of salt production. For instance, a recent multilevel approach study has been carried out in southern Portugal examining the value of each activity developed in a saltern area (Sainz-López, 2017).

TYPOLOGIES OF SALTSCAPE TOURISM

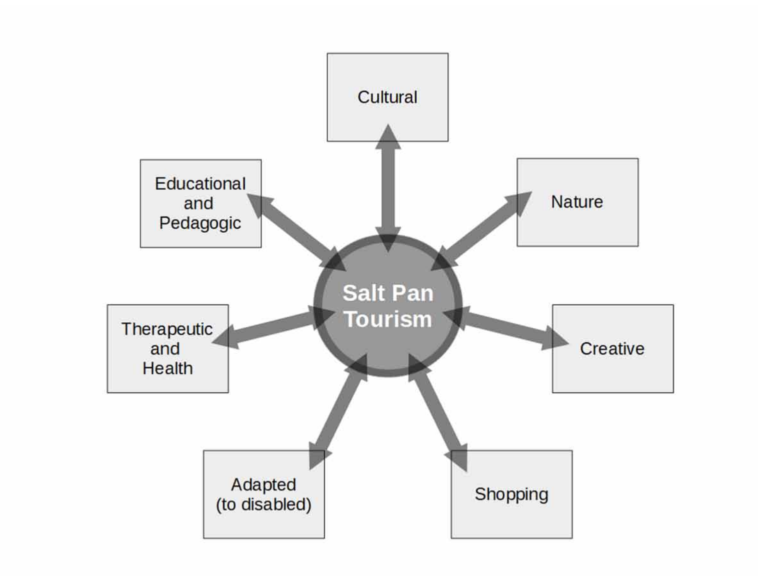
A step forward towards a sustainable tourism activity, from the environmental, social and economic perspectives, is the design of guided tours having in mind specific trails matching features of the area and tourist motivation (Chiodo et al., 2019). Novelty seeking is a well-known push factor for leisure travel (Heung et al., 2001). There are different forms for businesses to explore the potential of *saltscape* tourism (Figure 9.1). Creative experiential proposals can be materialized in innovative tours focusing on natural or cultural attractions, such is the case of a salt pan (McKercher & Ho, 2006). Traditional salt pan activities can adapt to accommodate tourism and the higher needs of tourists related to self-improvement, learning and long-life dreams and aspirations (Morgan et al., 2009). Under the current competition conditions, business competitiveness and destination sustainability are increasingly dependent on parties to meet visitors' expectations towards rewarding personally meaningful and memorable experiences (Tung & Ritchie, 2011).

CULTURAL TOURISM

Cultural tourists aim at finding either different experiences or to embrace each attraction in different levels (McKercher, 2002). Traditional salt production is an ancient activity and as such proposes to these visitors the heritage experience (Wu et al., 2015). International destinations are high profile attractions and powerful visitor attractors due to their intrinsic cultural and historical value. Salt mines are a common tourist attraction in many countries due to their medicinal properties. Examples may be found in eastern Romania, where archeological evidence has been found (Sandu et al., 2010) and in Poland, as Wielczka geopark is one of the most popular salt mines in the world, classified with the status of world heritage (Wójtowicz et al., 2011). Salt mines in Austria have been important to establish trade relationships with neighbors since the Iron age (Binkerd and Kolari, 1975). In Croatia, the Nin saltworks area is a place where birdwatching, cultural and medical tourism jointly developed (Bosna and Miletic, 2016).

In order to reduce the negative impact of anthropic intervention, the interaction between natural features and human activities must be non-disturbing. Businesses combining nature and cultural tourism may be attracted to develop activities in such a scenario. However, in specific natural settings, in order to avoid disturbance, small groups of tourists are adequate to meet the area's equilibrium. In Central Portugal, some traditional salt producing places near the coast, as Figueira da Foz and Aveiro, have been converting salterns from salt production businesses to tourism businesses (Balsas, 2019). In Southern Portugal, small salterns have gone through similar transformation (Coelho et al., 2014). Some of them

Figure 1. Salt pan tourism



keep to this day both activities. Salt production is then a charming activity proposed to visitors, other businesses have chosen tourist activities to complement the business core activity.

Nature Tourism

Specific flora and fauna are found in salterns and nature tourists are attracted to visit such areas. In a *saltscape*, manmade constructions shape some aspects of nature. For instance, by retaining waters with increasing salt graduation, some tiny organisms use such habitat and find a place to develop there. That is the case of microalgae from the genus *Dunaliella spp.* and the brine shrimp that feeds upon it called *Artemia spp.*, which presents different species according to the geographic location. This tiny crustacean finds its optimal conditions not at sea or in the twisted tidal creeks, but in the evaporation ponds characteristic of the salt pan setting. The reason is because in the evaporation ponds there is high salinity and few species can resist this saline shock. A result due to the lack of predators of the brine-shrimp is that they can proliferate. Several seabirds that feed upon brine-shrimp find in the evaporation ponds a good resource of food available at any time and tide independently.

There are examples of saltworks with a strong link to nature, particularly seabirds that found the saltern man-made habitat very important, as is the case of the Margherita Di Savoia saltworks located in Apulia (South Italy) (Zeno, 2009). In southern Africa (Botswana, Namibia and South Africa), the lesser flamingo uses the vast salt pan areas in desert and arid places as an important habitat where the species breeds (Krienitz, 2018). Other feature that attracts nature tourism is the fact that saltworks have been considered as areas of special protection and are being protected under the auspices of international conventions such as Ramsar and Natura 2000 (Zeno, 2014).

Creative Tourism

Richards and Raymond (2000) defined creative tourism as the one that provides visitors the opportunity to develop their skills, intellectual and physical resources, and creative potential by taking active part in experiences, combining learning and entertainment. Creative tourism propositions take place at the destination. There is an increase in the demand for creative tourism as a result of changes in society in general and individuals' lifestyles (Campos et al., 2018).

Creative tourism examples may be found in many places all over the world, and main benefits relate to sustainability of traditional activities, closer involvement with local communities' life, and deeper knowledge of culture, heritage and tradition. From the tourist point of view, creative tourism points to experiences in which tourists *do* rather than *gaze*, and *produce* as much as *consume* (Richards, 2010). Workshops, courses, events, itineraries, open ateliers, settings adequate to learning and entertaining moments, during which visitors get involved with the local experts, and benefit from traditional wisdom, are highly enriching experiences, and experiential meaning comes at a deeper and more personalized level (Richards & Wilson, 2006).

When tourists really want to have an experience in a salt pan landscape and seek telluric activities that place them closer to production processes higher levels of satisfaction are expectedly to be achieved. In the traditional production of coarse salt, ancient tools are used notwithstanding adaptation to modern times. In some countries, a standardization of tools may be found (e.g. France), whereas in others the producer designs the tools as a result of personal experience and empirical knowledge (e.g. Portugal). Hands-on-approach activities provide tourists with similar tools to those used by salt pan-workers. Rakes for coarse salt and squeegees for flower of salt are a common practice (Ramos et al., 2019). Tourists in creative experiences enjoy trying to collect flower of salt and coarse salt. More elaborated activities seem to be welcomed and tourists like to be creatively active. Creative tourism in salt production fields may include tourists participating in the production process alongside with purchasing products and services developed *in loco* (Wu et al., 2015).

Shopping Tourism

Shopping is classified as a type of tourism when *shopping* is the main purpose of travel (World Tourism Organization, 2014). It qualifies as a social activity involving either leisure or economic rationality, and various mood dispositions, most commonly positive ones (Josiam et al., 2004).

From the early beginnings of tourism, shopping is part of the travel, combining tourists' visits to destination attractions (Saayman & Saayman, 2012). Some destinations around the world are prominent centers of shopping and on account of this they are also great attractors of national and international visitors. Tourists purchase motivated by all sorts of reasons, but specially by the will of collecting souvenirs typical of a certain destination, bringing home tangible evidence of the trip. Additionally, the products bought at the destination are not usually available at the home environment, shopping activity becomes closely linked to the need of bringing back home material signs of unique, experiential memories of the trip (Kinley et al., 2003).

Food items are attractive types of souvenirs as they bear social-cultural meaning (Horodyski et al., 2014). Salt-based businesses involve traditional activities related to extraction and processes of transformation of salt from a raw resource into a commodity. Salt packages are available in these locations to visitors, easily serving as attractive souvenirs. Some of these businesses are becoming increasingly sensitive to current visitor trends and profiles, which point to an interest in actively participate in the production processes, including in the creation of personalized packages (Ramos et al., 2019).

Accessible Tourism

Accessible tourism is the tourism that "enables people with access requirements including mobility, vision, hearing and cognitive dimensions of access, to function independently and with equity and dignity through the delivery of universally designed products, services and environments" (Souca, 2010). Salt-based tourist areas, such as salterns or similar are potentially exclusive to people with some sort of special needs, as they present natural features that can turn into obstacles. Traditional salt pans work basically with two natural elements: the sun, which provides the solar power necessary for water evaporation (by this increasing the precipitating of salts), and the gravity force.

Precautions with the sun can be summarized basically in the provision of adequate shaded areas not only for tourists with special needs, but basically to everyone. Gravity, if used adequately, allows energy saving through the movement of a large quantity of water during the evaporation and precipitation processes. As a result of this, evaporation ponds are slightly unlevelled with an increasing deep from the less to the most saline basin. All around the intricated water ponds there are corridors of access to be used by salt-workers. Some of these main corridors can be made accessible to visitors with locomotion disabilities or elderly people. In a salt pan, passageways are usually at a higher level and this tends to be flattened in order to facilitate salt transportation. Having in mind just slight adjustments namely to make the soil harder just by adding some gravel to the muddy paths, can help to overcome many locomotion limitations even during the wet season. People having other disabilities, as visual impairment, can make use of tactile models and maps. Those instruments have already been used for people with such handicaps (Rener, 2017).

Therapeutic and Health Tourism Activities

Salt has therapeutic properties and is used in treatments (Langer, 2015). Experiences with high density waters can be intense and an opportunity for relaxed fun. The easy floatation on salt-water is relaxing and simultaneously treats the skin. Some experiences can be in fact distinct from ordinary visits. For example, buoyance sensations in high salinity waters are probably unique in the *Dead Sea*. The uniqueness of the characteristics of this sort of site depends not only on the physical-chemical properties of the water and the related benefits people gain from experiencing them, but also on the historic details and narratives attached to the place (Buda et al., 2014; Laws, 2015).

Health tourism is sought by tourists motivated by the need to sustain or improve health and wellbeing (Padilla-Meléndez & Del-Águila-Obra, 2016; Romanova et al., 2015), and salt is beneficial to health. Scrubs, massages and inhalation are some types of treatments known to tourists visiting salt-based locations and businesses (Mandelartz, 2018). Premises and facilities needed for people to enjoy salt-related experiences in diverse environments may be as simple as a changing room or a freshwater shower so that participants have the chance to remove salt remains.

Educational and Pedagogic Activities

Educational activities are an option to develop tourism related to educational programs and agendas. Students at different levels are involved in outdoor school activities, matching specific objectives of scientific areas and courses: geography, physics, chemistry, history, biology and other sciences. Project development focusing on salterns includes educational objectives and targets, allowing expansion of cultural tourism. One prominent case is that of *Santiago da Fonte* salt pan in Central Portugal (Martins et al., 2013).

CONCLUSION AND RECOMMENDATIONS

Salt producing landscapes are found in nearly all places around the world, either related to historic, cultural or natural settings. There is an increasing demand for tourism in natural landscapes (Villalobos-Céspedes et al., 2012). Salt pans, despite being man-made landscapes, are closely related to saltmarshes and are increasingly being sought by highly interested, motivated tourists. Traditional salt production goes beyond the telluric activity of men and earthen ponds. This ancient activity attracts tourists from different parts of the world who want to make real contact with the production of a raw material that contains several elements other than just sodium chloride (NaCl). Concerning tourism in a salt pan, product and service offers are diversified. From simple trails highlighting the surrounding nature, to replication of handcraft activity or to role playing with tools are options available to creative, participative tourists. Floating in a high saline pond or having a bath with medicinal purposes are options to visitors concerned with health improvement.

There are however concerns related to the development of tourism activity in a salt pan. From the supply side, it is important to help growing the market segment. From the demand perspective, it is crucial to know who the tourists are attracted to such specific type of tourism. Further research should highlight information useful to business and destination managers. Studies adopting a typology approach would shed some light onto the predominance of such tourists: cultural, health, natural, and/or creative.

Access to salt pan settings may be constrained due to the harsh conditions people are exposed to (essentially sun and salty wind). Visitors to such places may have mobility limitations but still want to take part in a salt pan activity. It is important to find out possible solutions to deal with such cases.

In order to increase business and destination competitiveness, joint projects for tourism development should be stimulated, bringing together salt firms and tourism operators. All parties involved would benefit from collaboration: 1) salt producers tend to diversify their activities in the salt pan and expand expert knowledge through their production and products, thus potentially create additional links to sell products including exporting them; 2) tourism operators have a chance to diversify their offer to highly demanding and motivated visitors, expectedly attracting diversified market niches; 3) tourists may benefit from the comfort of planned and guided visits during which entertainment is facilitated according to their choice and need (i.e., cultural, nature, creative, therapeutic, pedagogic, or other).

Moreover, in a planned and participated approach to tourism development, tourists interact with local settings without causing non-desired disturbance (either to the producer or nature). Free riding tourism is disruptive. Uncontrolled activities disturb salt production environments either because some of saltern activities are not prone to be disturbed (either due to safety or any other reasons), or workers want to preserve their right to privacy, e.g. feel protected from being photographed without consent. Certified guides linking the salt businesses to tourism operators prevent risks of free riding.

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Chapter 10
Entrepreneurship and Innovation in Tourism E-Businesses:
Their Relationships With Their Audiences

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ABSTRACT

The emergence of social networks has revolutionized the way people communicate and share information. Consequently, it becomes important to analyze the role of these models of collaboration and innovation through social networks in the strategic vision of the responsibility of marketing and communication in tourism industries, mainly the role of Facebook in e-business actions. This chapter presents a qualitative and exploratory analysis of the individuals in the virtual context of the social media, their behaviors, reactions, and attitudes, to perceive which social factors can enhance the appearance of competitive advantages for the organizations. There was a predilection for companies with a greater international connection at the level of clients and also at the level of the operation because there was a predominance of companies related to the tourism sector of Madeira.

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INTRODUCTION

In the new century, advances in technology have brought tremendous changes to consumers, markets, and marketing. These new technologies allow connection and interaction between individuals. The tourism sector is one of the most affected by this new reality, as indicated by data from different studies on Internet users and tourism (Devis, 2010). Many companies have not yet integrated the new technologies into their processes, even when they assume they will depend on them, prefer to continue operating as usual, with a high opportunity cost compared to competitors (Correia et al., 2014).

The emergence of social networks has represented a before and after in communications through the Internet. Thanks to the many possibilities they offer, they have become one of the preferred ways to keep in touch (Martínez-Valerio, 2012). An effective use of social media can represent a source of competitive advantages for organizations that are difficult to imitate due to the architecture of connection to the company, playing a strategic role in the differentiation or cost, to the detriment of a purely face-to-face role.

Social media has become intrinsically involved in the business. Companies need to understand that they no longer own exclusive consumer relationships with their products / services, so the survival of organizations will depend on their ability to socialize and interact with the audience.

This socialization through social networks not only consists of providing content, but also comments and opinions on different topics, which can be read and re-commented by others (Martínez, Bernal & Mellinas, 2012). We are therefore in contact with people, companies, organizations and brands, which are transformed into content contributors, affecting the way in which others see them, which gives rise to what is known as “online reputation” (Hernández, 2009).

Several studies (Murphy, Moscardo, Benckendorff, 2007, Litvin et al., 2008, Fotis, Buhalis, Rossides, 2012, Leung, Law, Van-Hoof, Buhalis, 2013) show that content generated by users through social media tend to be perceived as more reliable information than content offered by other more institutional sources such as official websites.

Consequently, it seemed opportune and interesting to explore the phenomenon of virtual socialization (especially on Facebook), which is still a little studied area and which requires an innovative theoretical approach under the heading of marketing and communication, two elements present in all organizations and whose functioning is important for the proper development of these entities.

In a more transparent and dynamic world, where consumers rely more on other consumers for advice and recommendations on products and services, and increasingly through social networks (Leung et al., 2013), it is important to know how and why the ecosystem of social networks (especially Facebook) has influence on organizations (Sánchez, 2010), how companies can plan their strategic integration, how they can identify new opportunities or how they assess technological innovations, and how they obtain new business models from their use. Besides being necessary to know how to manage the consequent changes, or how to exploit the investments in the social network and ensure the proper return and what will be the appropriate behavior of the employees to work within a wider and dynamic community.

This “new” philosophy of approach to the public, of interactivity and personalization, is reborn expanded in its reach through the partner platforms, which despite being a marketing aspect that in recent years has deserved prominence, was always confined to a limited audience. Social media now allows destinations and companies to interact at any time and directly with their different audiences at a relatively low cost (Kaplan, Haenlein, 2010).

It is important that social networks, especially Facebook, become an excellent channel of communication between consumers and businesses (Sánchez, 2010), which underpins this research project. The selection of Facebook as analyzed social network is justified by its great size, its popularity and the role that it plays in the social relations of the tourism companies.

This study fits within e-business, giving special relevance to interactive digital marketing and focusing on the impact that the social network has on Facebook in individuals and tourism companies, to understand what are the relevant factors for the interactivity between these companies and consumers. In this sense, the main objectives are: 1. What is the strategic vision of the responsible of marketing and communication in tourism industries regarding the social network Facebook; 2. What is the role of Facebook in e-business actions.

This research also aims to contribute to the study of the strategic sustainability of tourism organizations through the use of social networks and relies on the continuous analysis of the behavior of individuals, their needs and desires. Therefore, the proposed objectives lead us to the theoretical analysis of the literature published in the area of social networks (whose exposure is described in the theoretical framework) and empirical analysis, which is based on the random sample of companies. It is fundamental to cross the results and the theories presented by the studied authors, with the empirical observations, with the intention to verify the degree of approximation between both aspects.

The theoretical approach from the analyzed bibliography, when portraying the various contexts studied by the selected authors, their analyzes and results, will allow to understand the functioning of Facebook as a marketing tool for tourism companies and will provide a basis for further verification in the empirical context.

As stated by Izaguirre (2007), the analysis of the literature will allow to contrast, update and complement relevant data, in the collection of information about the object under study in the theoretical framework, allow to analyze the methodologies and conclusions of other relevant researchers and compare with those that are investigate the object of study.

The methodological option lies in the exploratory and qualitative study of the Facebook case. Initially, the investigation and the theoretical interpretation of the research are carried out and subsequently verified in the empirical context of the sample.

The universe of non-representative analysis is composed randomly by representatives of tourism companies established in Funchal (Madeira), Portugal, with the intention of understanding if the theoretical claims are also present in this region, regardless of their peculiar characteristics.

The selection of the city of Funchal for the empirical analysis is due to the fact that it is the capital of an island territory characterized by its entrepreneurship and geographic distance from European territories and where social networks are especially important to suppress this physical distancing with its clients. Besides that, the author resides in this city, which facilitates, in a practical way, the accomplishment of the study.

LITERATURE REVIEW

Social Networks and the Communication of Organizations, Particularly in the Tourism Field

The reinvention of society and current organizations is constantly proclaimed by several authors who assign them various denominations such as Wikinomics (Tapscott and Williams 2008), Groundswell (Li and Bernoff, 2011), Tribes (Godin, S., 2010), among others, to social networks, social media, characterized mainly by speed, transparency, collaboration, trust, ubiquity and social. Crowding people into a single environment, a great brain of direct links without intermediary (producer-consumer).

Li and Bernoff (2011) use the wave analogy (Groundswell) to characterize the spontaneous movement of people who use online tools to connect, lead their experience and get what they need (information, support, ideas, products, and negotiation power) of each other instead of the companies, a "wave" that changes the organic structure of the current social structures by the action of three forces: people, technology and economy. People for strengthening and relying on one another and their insurrection for subjection to institutional power evident in social movements such as unions and political revolutions.

The apparent "balance" between people and institutions was affected by the second force, social technologies, which changed everything to the interactions between people. Most people in the West came to be online (about 80% Americans and 70% Europeans) with fast and ubiquitous connections. These technology users get what they need from others instead of relying on traditional organizations.

The strength of these millions combined with the rapid evolution of technology regardless of success reinforces the "wave" of social change catalysts, which together increase the complexity of traditional business management and decreases control (base) in communication strategies for tourism companies.

Li and Bernoff (2011) stress the need to understand how new relationships are created in social media, the impact of technology change on personal relationships

Jenkins (2008) uses the term "convergence culture" to focus on three main concepts of social media culture: media convergence, participatory culture, and collective intelligence.

Media convergence refers to the flow of content between the multiple platforms and the migratory behaviors of the audience. People, fundamentally, look for their own entertainment experience.

Participatory culture underlines the contrast of the traditional concept of passive observer at a time when producers and consumers do not show clear differences, interact based on rules that, however, are not perceptible. Collective intelligence, a tendency to make consumption a collective process, sharing knowledge to understand the amount of information available, through the input of several people.

Collective intelligence can be seen as an alternative source of media power, refers to the ability of virtual communities to leverage the combined competencies of their members. This will gradually change the way the consumer culture operates. It is impossible for an individual to retain all knowledge, only some things are known to all, collective intelligence assumes that each person has something to contribute. What holds collective intelligence together is not the possession of knowledge, which is relatively static, but the social process of acquiring knowledge, which is dynamic and participatory, continually testing and reaffirming the group's social connections. Intelligence communities are the essential process of convergence (Jenkins 2008).

Companies that decentralize the passage of information become a community of individuals who share and contribute to the knowledge of the company, consequently valuing its intellectual property and increasing the connectivity between the information centers stored in the company, the more agile compared to the traditional hierarchical structure (Brown, 2010).

Changes in Marketing, Relevance of Communication, Relationship, Personalization and Feedback

Marketing is often associated with innovation. Linking marketing to social networking could be an affordable way to integrate both. Communication as a marketing component and the functional integration of networks as management innovation.

There is no consensus on the existence of a targeted marketing for social media, it is argued that there has not been a significant change in marketing practiced in the social Web because marketing actions in the placement of advertisements and sale of advertising on the web continue to be the same and concepts like viral marketing or word of mouth predate the phenomenon of social media associated with Web 2.0.

Many authors consider that the basic principles of marketing and management remain valid in social media, marketing mix segmentation and correlation activities, management of the economic potential of virtual social media, and its ability to reduce inefficiency and intermediaries. However, the use of these concepts associated with a scenario of greater interactivity between people and organizations and multidirectional communication emphasizes a change of values (transparency and trust) in marketing management that encompasses internal resources and their relation with the outside world.

Regardless of the basics of marketing and management remain valid, new practices emerge beyond presence on social networks. The "word of mount" recommendations that leverage offline business also replicate results in the online social networking environment, albeit in a more accelerated and interactive way, particularly in Facebook Pages and with differences in the management of the economic potential of virtual social media, in its reduce inefficiency and intermediaries compared to traditional means (Dunay & Krueger, 2010).

In this way, traditional advertising marketing and ads designed to persuade people to buy products is not the best way for social media channels, which require interactivity between people who share interests via word of mount or "viral marketing ", a factor that supports the spread of the company / brand. In social networks the most credible message is transmitted from one friend to another. This means that the company must ensure that all communication is as open and honest as possible (Dunay & Krueger, 2010), (Scott, 2010).

For many organizations, communication efforts focus only on the preparation of advertising campaigns, public relations, direct marketing, etc. Many organizations have simply created electronic versions of printed materials. In many cases, organizations are reluctant to use the full potential of collaborative tools (such as blogs or discussion forums) for fear of losing control of information about the organization and its direct relationships with the public. (Peri, 2009), (Jenkins, 2011). However, communication covers all daily activities from the satisfaction provided by your products / services to the behavior of your employees. The public receives information from the organization through everything it does and says. (Peri, 2009).

Consequently, there have been two speeds on the Internet phenomenon. On the one hand, technological advances, which introduce new resources and tools, and on the other, more slowly and gradually, the sociological changes of acceptance and use of these technological advances, a radical change in the pattern of relations between an organization and its publics. (Peri, 2009).

In marketing communication continues to play an important role, however, with greater difficulty, technology and other factors have profoundly altered the way consumers process the information and where they do it. The rapid diffusion of broadband internet, access devices and social media has led marketers to rethink traditional practices (Kotler et al., 2009).

In the last years, marketing has been broader in scope, extending the transaction to the exchange relationships. The basic purpose of business relations goes beyond the transaction and also covers the establishment of stable and lasting relationships with users, which are beneficial to both parties, leading to increased confidence and hence a willingness to help each other, reflecting directly on the reduction of transaction costs and time (Sixto, 2010).

For Godin (2007), establishing lasting relationships with the consumer goes by honoring his will, what he calls "Permission Marketing" whose basic principle is to guide marketing to the people who want it, the main rule is to respect the user who has enormous decision-making power within an increasingly demanding market.

Consent / allowed marketing is the integration of two opposing positions, consumers looking to not waste their time and paying companies to get their attention. Companies communicating with volunteers ensure that consumers pay more attention to the marketing message. The goal is to develop an interactive communication with clients over time in order to establish a relationship of trust and loyalty.

According to Fernández (2008), Social Media Marketing describes the use of online collaborative social networks, blogs, wikis, and other online collaborative forms for marketing, sales, public relations and customer service purposes, and opens up new opportunities to increase traditional marketing efforts. As interactive marketing, it brings together the multidirectional flow of information; feedback; fidelity through attractive contents, constantly renewed and personalized and sense of belonging to the community; functionality in writing, graphics, audio and video (fast and affordable). In online brand monitoring, it offers new public relations, market research, customer service ideas, and encourages buying orientation, while providing instant feedback on advertising efforts.

The use of social media is more than having a Twitter account, than accumulating "taste" on the Facebook page. The reason for being a social media company is driven by the desire to remain competitive. Given the growing number of social and user tools, social presence must be a commitment that goes beyond mere participation, so the organization will use social tools as a means of communicating with clients, which means that social organization democratizes the company and paves the way for business visibility and transparency, which for many companies is scary (Salt, 2011)

The Actions of Social Media Strategies as an Integral Part of the Company's Marketing Strategies

Despite the practice of management, which may not have evolved much in recent times, the environment found by companies in the 21st century is the most volatile ever. This new century, although recent, has been fertile in new challenges for management. The new reality calls for new organizational and management capabilities. To thrive in an increasingly disruptive world, companies must become strategically adaptable as operationally efficient (Hamel, 2007)

The strategic aspect refers to the set of decisions and measures of a structural nature, that is, they involve the fundamental and generic aspects of the organization, such as the area of activity in which it works, the generic type of technology to adopt, and long-term in terms of market share, etc.

Participation in online social culture involves listening, talking and influencing activities that are based on actions to an effective strategy namely identifying key users of the groups, knowing their dynamics of functioning and motivation, converting these users into brand evangelists (Fumero, et al., 2007).

Therefore, in listening to the market, participation in social media follows the same offline orientation, therefore, listening and monitoring the organization's area of activity (consumers, industry and competition) to know the needs / reactions of consumers and the pros and cons of the existing companies and products is fundamental to develop strategies and objectives of participation in the social media identified with the target market of the organization (Zarella, 2010; Dunay & Krueger 2010; Brown, 2010; Pardo, 2010).

For Li and Bernoff (2011), the strategic plan for social media is based on four procedural steps: the people (who are the clients and what are they prepared for?), The objectives (interacting in the media in marketing or generating sales, internal participation), strategy (what is the relationship with customers? using customers to spread the company's message in the market?) and technology (what applications, blogs, wikis, social networks?).

According to the same authors, the clarity of the objectives underpins the strategy. In observing hundreds of companies pursuing groundswell, five primary goals were identified by these organizations, namely:

Listen: Monitor online conversations or create your own community. Companies use groundswell to research and better understand their customers, this goal is suitable for companies seeking customer perception to use in marketing;

Talk: Participate and stimulate two-way communication, which involves adding viral videos, joining social networks and user-generated content sites, joining the blogosphere or creating a community. Companies use groundswell to disseminate information, choose this goal when they are ready to extend digital marketing initiatives (banner ads, search ads, emails) to a more interactive channel;

Encourage: to use the company's customers to increase the power of word of mouth to sell to each other, especially to companies that recognize them;

Support: provide groundswell tools to help clients support each other;

Encompass: integrate customers into business operation, work together to develop new ideas to improve and create products and services. This is the most challenging goal of the five for companies that have achieved the previous ones.

For Li and Bernoff (2011), the goals for social media are linked to business functions, so the search function is to listen; the marketing function is linked to the conversation; the sales function is directed to stimulate it; the support function is linked to customer support to help each other and the development function corresponds to encompassing.

Creating and implementing a social strategy is difficult, mainly because there are few precedents and models that can be followed, so it is necessary to be constantly aware of the challenges and prepare to solve them (Li and Bernoff 2011). However, with no comparative basis, experimental models are prevalent, yet making multiple social media mistakes is by far better than not acting, it is the world of social economics (Qualman, 2009; Tapscott and Williams 2008).

Of course, implementing a social media strategy in the organization will drastically change the way the business is run. (Brown, 2010). The adaptation to a new world, where the influence of relations and the strategy of optimization in the search engines are important.

The Influence of Information and Communication Technologies (ICT) in Tourism Organizations

The proliferation of information and Internet technologies has created expectations in the use of these tools at work and in the ability of employees to find new ideas and improve their performance and the way tourism companies operate today. Companies must learn and understand how to transform newcomers through the new ICT channels and identify ways to improve contact with their audience as well as the efficiency and effectiveness of organizational communication.

These challenges are closer to management than to technology, whose main responsibilities are: ICT selection, supporting ICT adoption and exploiting ICT benefits (Kotler et al., 2009).

Organizations cannot fully understand the influence that ICT can have on performance. In most studies, performance measurement has been based on objective approaches, using a set of financial variables such as return on investment (ROI) and return on assets (ROA) or sales growth.

These measures have been criticized because they emphasize the economic dimensions of performance, neglecting other important business goals. In addition, the data required to compose the metrics are generally either unavailable or unreliable. Due to the mentioned issues, the use of manager's perception in studies of analysis of the impact of ICT in organizations grows (Mahmood and Mann, 2005) in the literature on ICT.

For Kotler et. al. (2009), marketing metrics refer to the set of measures that help the company quantify, compare and interpret the performance of marketing actions. Fumero, et al. (2007) emphasizes the need to define new metrics outside the traditional parameters of the diffusion media, appropriate to the phenomenon of social media and adapted to the new stage of socialization as yet unknown and without consolidated solutions.

According to Mahmood and Mann (2005) in a multi-year study they conducted, it was found that firms that invest more in ICT reach higher levels of performance and productivity, and investment levels align with the strategic objectives of the organization. However, investing in ICT is not necessarily a sufficient condition to improve performance, because its application can be poorly executed. The introduction of ICT can be a strong vehicle for information processing, although the focus on technology moves away from the main issue of value creation by information, whose responsibility goes beyond the technological function of the organization's managers and beneficiaries (Peppard, Lambert et al. Edwards, 2000).

ICT and digital marketing alone do not constitute a competitive advantage, this will depend on the ability of the company to exploit opportunities in its market, how it integrates them into the organization's routines and management skills, adaptation to other resources and exploitation of networks. Regardless of how digital technologies support activity in an industry, firms can only gain competitive advantage if they are able to improve and maintain their operational effectiveness above the competition (Kotler et al., 2009), so the competitive advantage is synonymous of superior performance. Differences in the way companies choose or execute strategic activities are the basis of competitive advantage (Davis, Dehning and Stratopoulos, 2003).

Its value for the business lies within the sphere of innovation and comes from structural changes (eg new business models and process changes) and product / service, based on the main lines of organizational strategy, constant adaptation to the changes in the market (customers, suppliers and others), in the way ICTs improve efficiency (time and cost) and efficiency (innovation / differentiation and quality) (Peppard and Ward, 2004).

Competitive advantage is a result and as such may be of short duration, especially if it is based only on the advantages of ICT. Consequently, sustainability can be defined as the ability to continuously deliver business value from ICT investments and this is the capability that ensures continuity (a new system can only generate short-term advantage while not being adopted by competitors). What is important is to understand the mechanisms and processes that guarantee the organization to constantly produce results in its market through the use of ICT (Peppard and Ward, 2004).

Sustainability involves developing combined actions of differentiation and cost reduction to drive the company into a zone of low or zero competition that provides sustainable growth and above-average profit margins (Kim and Mauborgne, 2005). In this sense, the inclusion of social media in the company's communication strategy will allow us to discover if there has been a change in what consumers value and to have an objective notion of the company and its products in the market, discover new ways of creating value for consumers, create a new demand and change the strategy supported by the price.

Methodology

The first part, in the elaboration of this investigation and starting from the objectives of the same one, concentrates in the search of bibliography that deals with the communication marketing, the virtual social phenomenon, sustainability and competitive advantages, to know the current state. Both physical and digital material were used and the most meritorious texts were chosen, including books, articles from scientific and specialized journals, databases and websites.

The consultation of these bibliographical supports allowed us to know the state of the subject in question and the elaboration of a theoretical and interpretative analysis that constitute the theoretical framework where studies / ideas of work framing are identified, in order to discern the role of the network especially Facebook in the communication between social network participants. The authors looked for concepts within the domain to explore, to recognize the conjunctures where the information and communication technologies associated to the social network, become catalysts of sustainable competitive advantages for the organizations or to identify the circumstances that lead to the divergence.

In the second part, the authors develop the empirical appraisal of the study, with the field actions. In this way, the methodology follows a qualitative exploratory analysis of the Facebook case, which identifies the topic under study, guided by the theoretical lines, a kind of primary theory that provides the structure for its investigation.

Following the exploratory purpose of the study, the randomly selected sample is illustrative and not representative, whose observation units were individuals belonging to an accidental non-probabilistic sample "snowball sampling" in which the person interviewed is asked to suggest another person for the interview. This configuration is generally used for exploratory purposes (Babbie, 2007).

In the observation is intended to understand how the participants behave in the social network Facebook and, later, to report these illustrations. Observation time ran from October to January 2012. The primary group were individuals randomly selected from businessmen and others living in Funchal. The intention was to analyze the sensitivity of the respondent to the social network, personal preferences (values and beliefs) and vision.

The contents of the interviews were analyzed according to Bogdan and Biklen (1994), following systematic procedures and objective description of the data in the form of words, citations, and transcripts of interviews that allowed to establish a more enlightening understanding of the object of study.

Areas of activity (universe: 15)	Number of workers	Annual sales volume	The company uses facebook
Maintenance services	5	250 000	Yes
Trade	6	400 000	Yes
Trade	8	400 000	Yes
Trade	8	400 000	Yes
Laundry service	9	270 000	Yes
Trade	15	700 000	Yes
Food industry	18	520 000	Yes
Maintenance services	20	1 700 000	Yes
Catering	40	2 800 000	**No**
Accommodation industry	41	1 500 000	Yes
Accommodation industry	50	1 000 000	Yes
Car trade and services	74		Yes
Accommodation industry	100		Yes
Accommodation industry	900	60 000 000	Yes
Accommodation industry	1000	50 000 000	Yes

The total number of contacts reached 35 people, however, only 22 collaborated, of which 14 (table 10.1 and 10.2) were chosen to make up the sample according to their size and sector of activity.

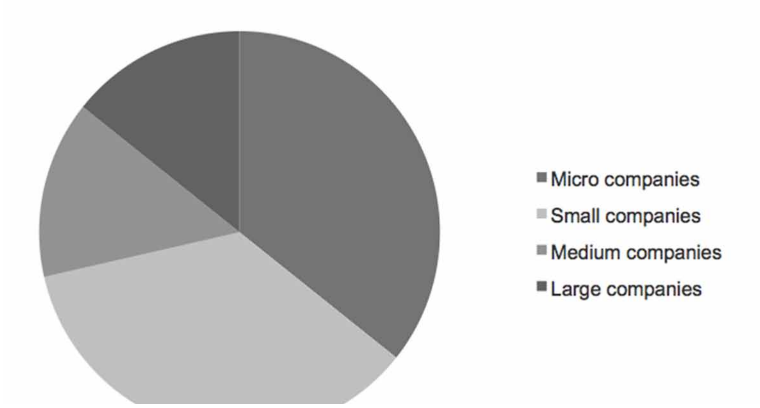
The universe of tourism companies selected intends to convey an idea of how social networks, namely Facebook, is perceived by those responsible for marketing and communication. There was a predilection for companies with a greater international connection at the level of clients and also at the level of the operation, reason why, there was a predominance of companies related to the tourism sector of Madeira. The descriptive contents of each intervention were presented to those observed for validation.

The objective is to perceive the experiences in the social network in a business way, the way in which the actors interpret their experiences and how they structure the social world in which they live, in order to build knowledge, to understand human behavior and experiences, to understand the process through which people construct meanings and describe in what consist of these same meanings.

The fourteen companies surveyed were grouped into four groups for the purpose of analyzing the interviews, following the criteria of the European Commission's recommendation of 6 May 2003, depending on the number of officials. In this sense, the authors have a group of up to 10 employees called Micro-companies, another group for small companies with a number of employees between 10 and 50 people, the third group of medium-sized companies between 50 and 250 employees and the last group, companies with more than 250 employees.

Analysis groups (universe: 14)	Total	%
Micro companies	5	33%
Small companies	5	33%
Medium companies	2	13%
Large companies	2	13%

Figure 1.



RESULTS

Reasons for Joining the Social Network

For almost all respondents in the sample of company managers, relational interactivity between company and fans is undoubtedly a source of information about their needs and desires, whose evidence is evident in the likes, comments of the interviewees and in interactivity with the "fans".

The information contained in the Facebook profile can sustain a segmented communication, however, in the sample of companies analyzed only an organization uses this information to adapt the communication to the characteristics of the segment. Nevertheless, all participants (with the exception of Micro-companies) expressed their intention of adapting their communication to the characteristics of the profile in the future.

About 70% of the participants participate in Facebook through the "profile", although many of the interviewees have evolved into a "page". Also highlighting the placement of the website link on the Facebook page by 21% of the participants and the fact that large companies are always present through a "page" and not through the "profile".

For most (57%) of organizations, the person in charge of managing the company's membership in Facebook is the manager, or director of the company. In 29% of cases, this function is the responsibility of the marketing manager and only one person interviewed in the organization interviewed is there for the management of social networks (Community Manager). In medium and large companies management is the responsibility of the marketing manager.

The frequency of participation in the social network is divided by: 36% with daily participation (100% in large companies, 50% in medium-sized enterprises, 40% in small enterprises and 20% in Micro-companies), 36% 20% in small enterprises and 60% in Micro-companies), and 29% with monthly participation (40% in small enterprises and 20% in Micro-companies).

In strategic terms, the most important reason for participation in the social network is to establish interactive relations with customers, with 71% of preferences, followed by sales growth with 64%, information sharing with customers and suppliers with 57% and relationship with clients with 50% among the most selected. The two large companies also assume great importance in accelerating and improving decision-making, more direct communication with the end customer, the motivation and dynamics of the market itself, the very adhesion to the social network provides a greater approximation to other regions where the business group is present and supposes an incentive to the participation of employees and clients.

There is no effective control of cost versus outcome in the 14 interviewees. For those cases where the result is higher than the costs, there is some subjectivity by comparing the resources used in network management with the tool's interaction capacity and its results, although some feedback is noticed after the publication of some content and events.

The Micro-companies reasons are: the dissemination of products and services, the fact that it is free and the suggestion made by friends and family enrolled in the social network for the company to be present, one of the cases made reference to the lack of a company website.

The Small-Companies Reasons Are: Go beyond the commercial side of presenting products and services and establish relationships with the fans, there is concern to use other potentialities of the social network, as noted in the comments of the participants:

"At the beginning I had only the personal profile, but with the increase of users, I decided to create a company page that allowed mainly to inform the fans of the products and services and to receive their opinions, if they like what we sell and how serve, understand if we are selling and doing something they like and can introduce exchanges if they do not like something "; "The realization of the benefits of proximity to the client and being a communication medium with minimum costs"; "Disclosure of services, be a communication media, easy to use, popular and without geographical restrictions."

The Medium-Sized Companies Reasons Are: A greater connection with the company and the reasons for using the Facebook platform as verified in the following comments: "Social interactivity, speed of distribution of information, intended targeting"; "gain greater visibility on the net, improve communication with customers, promote the hotel and the brand, the number of Facebook users is increasing and there are more active users in this network than in Google, share information with customers, both at the destination level, and at the hotel / product level. "

The Large Companies Reasons Are: Communicate more directly with the end customer, the dynamics of the market itself, increase brand awareness and preference, establish interactive relationships with customers, share information with customers and suppliers and promote business transparency, according to the "joining the social network provides the approximation to other regions where the group is present, the participation of employees and customers in the network, the growing number of users, the fact that it is an easy and economical tool and the partial replacement other media (newspapers and television) ".

Regarding the existence of a communication strategy for the social network and its inclusion in the general strategy of the tourism company, one of the big companies has shown a structured communication strategy for the social network embedded in the company's overall strategy. For the two medium-sized companies, the presence of the brand appears to be associated with the brand communication strategy, they have a regular participation in the events and daily follow-up of the fans, in one case it is part of the group strategy and only one of the small companies also has a strategic definition for the social network. Most use the platform as a communication channel and to promote products / services and promotions. One of the organizations claims to have a communication strategy for the future integrated social network.

Participation in Social Networks

In the universe of companies participating in the social network, the options that characterize the participation of organizations in the social network are comments and active participation with fans, referred to by 64% of the observed, the textual information in the page of the company with 57% and the interactivity with the fans that participate in the page with 43% of the opinions. For Micro-companies, with 60% of opinions, the most important are promotions and sales in the social network. Due to its importance, the response to all comments, the placement of content and the incentive to retransmission is also important, as is the supervision of social networks and the evaluation of the propagation of content.

The relevant points of the social network Facebook highlighted by the interviewees vary according to the size of the company. Micro-companies highlight, in particular, cost factors, results, reach, opinion, publicity and publicity impact, while larger companies are of the opinion that the most important is the relationship with customers and interactivity, as well as detection of customer needs, adaptation of supply and transmission of content. However, there are some doubts about the effectiveness of communication actions in the social network or how to improve the efficiency of online presence, as well as how to encourage the participation of fans, how to avoid the loss of productivity of employees, the need for a platform of communication management in social networks and, finally, the need for new functionalities in terms of marketing and communication management.

Most of the participants in the business sample agree that communicational interactivity with the brand enables the company to identify individual needs and desires by analyzing the content of that communication, evaluating comments and likes, and purchasing models. However, some of the interviewees have no opinion formed on the subject.

For the 14 companies analyzed, except for one of the elements of the sample that justifies their choice due to the lack of indicators that allow signs of loyalty to be recognized, all stressed that there is some influence between the company and fan relations (customer) and loyalty the brand exemplifying with specific situations “in the notoriety and loyalty of the positioning of the product / company in Facebook, in the contagion in the network and in the weight of the opinions of relevant friends”; “Becoming a fan announces some predisposition to be loyal to the mark “.

Most interviewees do not use the profile data to tailor communication to the individual characteristics of the “fans”; however, they refer to the importance of obtaining the data in the personalization / segmentation of the communication and the future use with authorization.

Companies continue to attach great importance to offline channels, with a predominance of direct contact / public relations with 57% of preferences and newspapers with 50%. For large companies, distributors are also important.

The Facebook Role in Interactive Communication and Marketing Actions

According to the representatives of the companies participating in the research, 50% of companies use only Facebook (80% of Micro-companies) in their participation in social networks. With participation in other networks, the great companies that use several of the social networks to connect with their clients stand out. However, everyone claims that Facebook is the predominant network for its size / popularity and for having a more complete platform.

Facebook and digital marketing technologies alone do not constitute a competitive advantage, they are dependent on the company's ability to find opportunities in its market, in order to integrate them into its routines, in the management of organization and the adaptation of the remaining resources in the utilization of the network.

In addition to the previous empirical results, the authors highlight a few more important points per group of companies:

Microenterprises: None of the organizations has a defined strategy for social networks and does not have a formally defined global strategy.

Small-Companies: Only one of the five organizations claims to have a communication strategy for the future integrated social network. "In the future it may be integrated into the company strategy, at the moment it is only used to promote the company and its services and the interactivity with the clients. some employees with authorization to comment "; "Right now it's a way to communicate with customers and I think their importance is growing."

Medium-Sized Enterprises: In both cases, brand presence is associated with each company's communication strategy, although partially integrated and planned in the global strategy.

Large Companies: Social network communication integrates into the overall strategy, although it is more comprehensive and direct in one of the groups, as shown in the interviews: "The strategic line for Facebook is part of the global strategy in terms of a communication tool. However, although the annual strategy is defined, monitoring of the social network requires an almost daily adjustment, due to the daily dynamics of the network and the insertion of spontaneous short-term information that was not foreseen in the plan. "Post" is centralized, with the participation of employees mainly at the "like" level.

CONCLUSION

The reinvention of societies and organizations appears linked to the social essence of human beings and the evolutionary motivation of the species, which is a reflection of the agglomeration of the individual behaviors of a society. The satisfaction of the needs of social connection has allowed that the technological tools associated to the social networks have had a high level of adhesion in a short space time.

Currently, social networks are a new marketing tool, more specifically, digital marketing, which goes beyond communication, is a common philosophy to every organization in its actions and reactions that links all departments and employees.

Understanding the relevant factors for business-to-consumer communication within the social networking phenomenon is essential to delineate the company's future and was the basis of this study.

Within the objectives outlined and taking into account the theoretical basis of the bibliographic research and its conclusions, the verification in the empirical study allowed to reach these conclusions.

The emergence of social networks and the concentration of various communication tools on a single platform has captivated individual users and revolutionized the way people communicate and share information, not only revealing a technological change, but essentially a cultural change, a process of social transformation where technology is an inseparable element of social and cultural trends. Companies continue with a traditional view of participation in social networks, since they come as an isolated "push" communication to the detriment of the interactivity that this channel requires of the participants.

In the strategic view of marketing and communications managers on Facebook, the statements of the authors analyzed, Tapscott and Williams (2008), Li and Bernoff (2011), Brown (2010), Kotler et. al. (2009), Peri (2009), Jenkins (2011), Fernández (2008), Scott (2010), Dunay and Krueger (2010), Salt (2011), Hamel (2007) and Qualman (2009), among others, coincide with the results obtained in empirical analysis. marketing paradigm is being enforced through real-time electronic dialogue, and new models of network collaboration and innovation can give managers new ways of interacting with their audiences by awakening human potential. It was confirmed that companies consider social networks as a fundamental element of their marketing strategy and not only as an additional channel in traditional communication strategies (although there are differences according to the size of the company when it comes to participating in the social network).

Sharing information interactively with customers could hardly be done on traditional channels. This two-way communication management is a key factor in the success of this type of communication strategy. Before the emergence of social networks, organizational communication was traditionally characterized by being unidirectional, the company transmitted the message and the audience simply listened without the option to respond and the organization controlled the message.

Bidirectional communication between tourism business and fans is also a way of segmenting marketing and communication actions, a source of information about needs and desires. The fact that the company maintains a stable relationship with the fans results in an increase in brand loyalty.

Evidence continues to show the fact that tourism companies have gone through the biggest change in their short history. Collaboration and network innovation models can give managers new possibilities to raise human potential, whose success lies in challenging the knowledge / experience that companies have accumulated over many years of thinking.

In recent years, there has been a greater reach in marketing practice related to exchange relationships. The basic purpose of business relations goes beyond the transaction, it also includes establishing stable and lasting relationships with users, which are beneficial to both parties, leading to increased trust and, consequently, predisposition to help each other, reflecting directly in the reduction of the costs and the time of accomplishment of the transactions.

The continuity of tourism organizations appears connected to socialization, the sharing of interests and activities with the audience, together with the incorporation of digital technologies in their activities, especially in those related to social networks. Technology emerges as a support element for the satisfaction of the social connection, transforming communication between people and companies, making it more dynamic and transparent

Regarding the role of Facebook in the actions of interactive communication and marketing, the statements of the authors analyzed, Fumero, et al. (2007), Fernández (2008), Kotler et al. al. (2009), Zarella (2010), Dunay and Krueger (2010), Brown (2010) Sixto (2010), Peppard, Lambert and Edwards (2000), Salt (2011), and Kim and Mauborgne others, coincide, in part, with the results obtained in the empirical analysis by which the authors can affirm that Facebook stands out for its size and orientation to relations, within social networks, being preponderant. It is an emerging space of convergence of pre-existing media, heterogeneous collaborative cultures and participatory audiences. However, adopting Facebook technology is not enough for integration into the online social movement, since Facebook's technology and digital marketing alone do not constitute a competitive advantage, are dependent on the company's ability to find opportunities in its market, so as to integrate them into the routines and management capacity of the organization. It implies a strategic attitude for the company to monitor consumer behaviors and to detect their needs and desires.

As the authors have seen, there are many positive factors related to participation in the social network, among them the interactivity, the detection of customer needs, adaptation to the offer or the transmission of contents without geographical limits and with ease to implement marketing actions viral.

On the less positive factors of participation in the social network, the authors could mention as important the lack of credibility of some information or the excess of information, the lack of response by some brands or the delay in meeting the requests of the clients.

To conclude, it is important to mention that monitoring and learning through the experience in the network as part of the organization's culture and routines are their own factors that can become competitive advantages because they are relevant factors associated with the tacit knowledge of the organization.

FUTURE RESEARCH AND LIMITATIONS

Further research should understand future changes on communication patterns between businesses and consumers, which will facilitate the economic development of the business.

Therefore, we propose to analyze the evolution of the various factors related to the social networks along the life of the organization, to determine how they contribute for the effectiveness of communication integration and departments and employees' interaction, so they can be integrated in the organization strategic plans and ensure sustainable competitive advantages.

Some limitations are related with fast literature obsolescence without addressing the issue in depth, sometimes referring qualitative studies based on demographic and geographic variables and traditional models.

Although the evolution of information technology is a catalyst for a more intense online social experience, it is important to understand how the virtual experience is lived for long periods, how it affects users' behaviors and which marketing and communications actions are more effective in improving customer relationships and increase customer retention.

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Chapter 11
Heritage as a Source of Competitive Advantage:
Lessons From Madeira

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ABSTRACT

Heritage tourism, as one of the most relevant market niches in the tourism sector, plays a key role in furthering the competitiveness of destinations in general. The relationship between cultural heritage and tourism development has received an increasing amount of attention by academia, owing to the persistent efforts of the DMOs to incorporate heritage resources in tourism plans. This chapter explores the potential impact of heritage tourism in the development of tourism products to increase overall competitiveness based on new combinations of heritage resources and traditional competitive advantages of the tourism sector. To this end, the chapter examines data pertaining to respondents hosted in one of the Quintas da Madeira. Findings suggest initiatives to increase the cultural component of the tourism experience to reinforce the capacity to transform heritage and culture in competitive products.

INTRODUCTION

There is a growing awareness that mature destinations efforts to assure a high level of competitiveness in the international market are increasing dependent on its ability to achieve an outcome on the current attempts to foster the cultural heritage sector (Catrina, 2016; Garrod and Fyall, 2000; Hall and Williams, 2008; Alzua et al, 1998; Halewood and Hannam, 2001). However, the relationship between

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cultural heritage, tourism development and destination competitiveness remains an under researched topic with respect to peripheral areas beyond the Mediterranean Basin (Apostolakis and Jaffry, 2005; Alberti and Giusti, 2012; Prentice, 1993; Viu et al, 2008), owing to overwhelming focus on traditional touristic hotspots benefiting from centuries old layers of archeologic, architectural, historical and cultural artefacts and traditions (Chhabra, 2010; Apostolakis, 2003; McGrath et al, 2016; Cjang, 1997; Chang, 2010; Chang and Teo, 2008; Prideaux and Kininmont, 1999). In counterpoint to the current focus on heritage-rich areas, this paper is based on a case study centred in the boutique hotel sector in Madeira. The local tourism sector has been akin to explore history and identity related to mega-celebrations and events to highlight a number of tangible and intangible cultural and heritage assets. The sector intends to increasing the destination´s competitive levels centred on a reinforced mechanism of product diversification (based on culture and heritage), as well as, on the acquisition and development of competences in staging experiences. The enhancement of the managerial skills and development of a collaborative and synergist mindset between policy-makers and key players is another matter of concern in this regard (Jesus and Franco, 2016; Laing et al, 2014; Poria et al, 2001; Smith and Puczkó, 2012).

The mild climate, the high number of hours of sunlight, the luxurious vegetation and colourful flowers along with the beautiful landscapes, have all been an important driver of the tourism demand in Madeira, and a key factor impacting the very nature of the core product being offered. However, Madeira has to offer a specific heritage/cultural background, shaped by the Discoveries and consequent introduction of new agricultural practices and crops (e.g. sugar cane, bananas, Madeira wine). Account should also be taken of the progressive development of a "welcoming society" (Husbands, 1983) as a result of five centuries of experience in dealing with travelers and colonists on their way to the New World. Moreover, as a result of the presence of a strong British community, dating back to the XIX century, another layer of cultural influences was added to the tapestry of cultural, human and historical influences governing the development of the island´s identity, to give Madeira a unique cultural and historical heritage. Nevertheless, it can be stated that he region cannot compete with other regions entitled to a richer cultural background. Madeira fails to offer an "unrivalled product for the consumption of the modern cultural tourists" (Markwick, 1999, 230), if we consider the number of archaeological artefacts, the history of military occupations and modern-day cultural expressions. As observed by Andriotis (2006, 631), "because of a lack of diversity in their resources, most island destinations depend overwhelmingly on the 4S's (sun, sea, sand and sex), only a small number of larger island destinations (e.g. Cyprus and Jamaica) are enriched with the resources that may allow the marketing of a diversified tourist product."

As a result, the major challenge facing Madeira consists in making the best use of the current stock of cultural and heritage resources, to optimise the development of the tourism heritage sector, in line with the current practice of in terms of cultural conservation and preservation and principles of integrity, authenticity and sustainability. In all evidence the volume of "pure" cultural tourists will remain insignificant, but it possible to envisage a greater number of tourists in a closer contact with the island´s cultural resources, which requires certain measures to be taken.

The purpose of this chapter is to explore the potential impact of recent developments in the tourism heritage sector, examined from a demand point of view in order to identify practical ways to develop the sector in a sustained, customer-centred, synergistic and competitive manner. In particular, the purpose of this chapter is to determine to what extent the heritage sector may contribute to reinforce the current competitive levels of the tourism industry based on the offer of cultural-related products. The second section of this chapter offers a brief note on the contextual setting under analysis. The third section will briefly review the strands of literature on competitiveness, heritage and boutique hotels, as the major themes of this chapter. The fourth section will present the research method and the main results, while the section five concludes by highlighting a number of contributions and recommendations.

CONTEXTUAL SETTING

The archipelago of Madeira consists of the islands of Madeira and Porto Santo. The archipelago occupies an area of 801 km^2 and it is home to 250,000 inhabitants. The archipelago through its geographical location, pleasant climate affiliation to Portugal, and strong sociocultural links to a number of countries in Latin America and Africa due to centuries of emigration, offers a rich natural and cultural environment. The tourism sector plays a strategic role in Madeira, and its economic and strategic importance is likely to continue to growth in the next few years, as the result of lack of other viable alternatives. Tourism is the most important economic sector, after the public administration sector. In 2015, the tourism sector contributed 25-30% to the region's GDP. According to Arditi (2015), based on data released by the Statistical Office, the sector generated 12-15% of total employment. Still based on data made available by the Statistical Office, Madeira welcomed 1.6 million international visitors in 2018, which represents an increase of 1.3 million when compared to 1980.

In the last decades, Madeira enjoyed high levels of EU subsidies that were instrumental to build a network of advanced infrastructure projects, namely in terms of an extended transportation network. Following the aftermath of the 2010 crisis, the local government decided, as a result of the existing exceptional circumstances (2010 natural disaster, 2008 financial crisis and 2011 debt crisis), to develop a number of strategic frameworks guided by a principle of economic sustainability (that is, to diversify its sources of income) in order to follow a less subsidy-dependent strategy. In this regard, the tourism sector was regarded as strategically vital for improving the region´s competitiveness, productivity, and economic sustainability. About the tourism sector in Madeira, a report commissioned by the European Union (Ismeri, 2011, 127), highlights the sector´ vulnerability "to the erratic and uncertain movements of tourism". Issues of poorly qualified human resources, "even if the region and its workers have a long tradition of high standards in tourism" (pp. 129), as well as the need to adjust to new development in the air transport sector and the ever-changing consumption patterns were also highlighted in the report. Whilst the sector will remain an important instrument and key driver of economic growth, a number of issues must be properly addressed such as the development of market niches and high added value activities able to attract a new type of tourist and to foster entrepreneurial initiatives in new market niches, the definition of a new development model for the tourism sector based on horizontal and vertical linkages and endogenous resources and the analysis of benchmarking studies centred on the best practices adopted by destinations in the same life-cycle phase.

With regard to the issue of endogenous resources, the Ismeri (2011) report highlights the contribution of the agricultural sector to forge the distinctive characteristics of tourism sector, owing the impact of farming on the island´ social fabric identity and authenticity, landscape and environment. In its view, there are similarly a number of possibilities for cooperation based on the few traditional industries still in operation (embroidery, wicker products) and on the wine sector and related traditions

This study is centred on the hotel establishments known as The Quintas of Madeira, considered one of "the region's great attractions". Such hotels display a number of key attributes and characteristics that makes them ideal to blend tourism, culture and heritage. According to the website madeira-live.com/en/madeira-hotels.html, each Quinta "is basically a traditional estate manor house that has been refurbished to cater for guests". The web site http://www.visitmadeira.pt, states that Quintas of Madeira have to offer "large, spacious blooming gardens, brimming with the rarest and most varied plant life", plus an ambiance that "encourage you to rest and relax or simply gaze at nature". They are indeed ideal "places for a stroll or to spend a family holiday." Quintas offer a privileged access to botanical gardens (in line with the best English tradition) planted with flowers/plants from most continents such as "orchids, birds of paradise, anthuriums, magnolias, azaleas and proteas". It is worth of consideration that a number of these tropical and subtropical plants were introduced in Madeira in the 18th and 19th centuries, by British merchants trading in the Madeira wine market. Still, according to the website visit.madeira, Quintas offer relatively cooler and humid micro-climates, "closer to English weather conditions", which makes them so attractive and thermally comfortable. All quintas are located in the island of Madeira, as the island of Porto Santo has no such type of accommodations facilities at their disposal.

LITERATURE REVIEW

A number of studies examined the topic of destination competitiveness from different points of view (Ritchie and Crouch, 2000, 2003, 2010; Manente, 2005; Azzopardi and Nash, 2016; Crouch, 2011; Crouch and Ritchie, 1999; Dwyer and Kim, 2003; Enright and Newton, 2004; Bull, 1995). Before moving on, and in order to correspond to the exigency on formal and conceptual rigor, we define tourism competitiveness as "the ability of the place to optimize its attractiveness for residents and non-residents, to deliver quality, innovative and attractive (offering good value for money) tourism services to consumers and to gain market shares on the domestic and global market places, while ensuring that the available resources supporting tourism are used efficiently and in a sustainable way" (Dupeyras and MacCallum, 2013, 7). Bris and Caballero (2015, 496) consider that the term competitiveness refers to "how nations and enterprises manage the totality of their competencies to achieve prosperity or profit" (See also Zehrer and Hallmann, 2015; Zehrer et al, 2016; Heath, 2003; Mihajlović, 2014; Pavlović et al, 2016; McKercher and Ho, 2006). Crouch and Ritchie's (1999) Tourism Destination Competitiveness (TDC) model highlight the importance of developing simultaneously a number of comparative and competitive advantages, including both hard-elements (e.g. resources such as culture, history and related activities) and soft elements such as management capabilities. Michael et al (2019, 54) observes that the more recent version of the TDC model developed by Ritchie and Crouch highlight an additional key factor pertaining to tourism policy related factors (e.g. "philosophy/values, vision, positioning/branding, monitoring, evaluation"), plus issues pertaining to the "quality of service/experience and to ´search of information and decision making aspects". Dwyer and Kim's (2001, 2003) developed a detailed model of destination competitiveness, based on an extensive review of the literature on the subject, with the ultimate aim of facilitating international comparisons. In general, the literature on the subject of destination competitiveness offers in-depth insights on a number of key issues impacting the development of the tourism sector in well-established destinations. For the sake of clarity, the main themes are grouped as follows, in line with Michael et al (2019): resources, infrastructure and support services, human related factors and business environment. However, such models have been criticized by authors such as Azzopardi and Nash (2016), for a number of reasons, including the inability to stress the importance of analysing both resources, tourists´ motivations and the current product mix to understand tourist reactions.

In this study, we turn our attention to the line of research focused on tourism resources, tourists' motivations and managerial competences, as a key driver of competitiveness, for a number of reasons. Past studies have found a positive relationship between resource development and destination competitiveness (Manente, 2005; Mihalič, 2013; Azzopardi and Nash, 2016; Crouch, 2011; Crouch and Ritchie, 1999; Dwyer and Kim, 2003; Enright and Newton, 2004), which indicates that a thoroughly understanding of such factors is increasingly important in any attempt to increase the overall levels of competitiveness of a destination. However, improvements in a number aspects, such as resources, infrastructure and support services, aiming at fostering the competitiveness are impossible to achieve in the short term, preventing the possibility of undertaking the changes necessary to increase the current levels of competitiveness. On the contrary, the development of competences in devising products, business models and experiences attracting tourists are more readily achievable, as can be seen in the field of heritage tourism.

Cultural heritage is increasingly important to the social fabric of cities and a decisive input in most attempts to rejuvenate destinations exhibiting dismal growth rates. Heritage is less and less perceived a financial burden for the taxpayer as a result of being perceived merely as a problem (if understood as a costly endowment to be preserved for the next generation) or as a source of concern for private owners. On the contrary, heritage is nowadays perceived as a fundamental factor in driving entrepreneurial initiatives and talent to the tourism sector (Firth, 2011; Gonzales, 2008; Grefe, 2004; Li, 2003; Murzyn-Kupisz, 2013) and therefore, a "factor of economic enhancement" through the development of intangible and immaterial factors of competitiveness (Alberti and Giusti, 2012, 262). Alberti and Giusti (2012, 262) observe that cultural heritage "fits very well into the current 'knowledge economy' paradigm as cultural skills support creativity". A number of well-known destinations and cities are been pursuing a heritage related tourism development policy. Alberti and Giusti (2012, 262) refer that such attempts involved a number a mix of strategies "ranging from new infrastructures to cultural programmes to education policies, from huge museums to events and festivals". In this regard, Alberti and Giusti (2012, 262) refer two main strategies: "either investing in huge infrastructures, architectonic and urban requalification, and great events (as a means for attracting new resources or restyling touristic destinations), or activating policies for diffused and micro entrepreneurial initiatives able to set up cluster arrangements around a multitude of cultural assets". The second approach offers the opportunity to work on heritage to develop a new cluster of activities, without recourse to external sources of financing or heavy investments._Gravari-Barbas (2018, 5) is critic of the current drive to develop heritage tourism based on vicious circle of co-production of heritage and tourism: "heritage development encourages tourism, which in turn contributes to heritage development, which encourages tourism, and so on" (See also Timothy, 2011). Gravari-Barbas (2018, 5) similarly observe that "nothing seems to stop the "heritage machine" from producing more and more, and more and more diverse, heritage artefacts and mentifacts" as a result of the impact of globalization on the ongoing process of heritagization (Gravari-Barbas, 2018, 6; Prentice el al, 1998; Xie, 2006; Timothy and Boyd, 2003; Timothy and Teye, 2009; Timothy and Gelbman, 2015). In the context of the globalization of the tourism industry, heritage has become a key aspect of singularization of places "through the production of unique and distinctive heritage objects", as the current drive to get a UNESCO World heritage designation illustrates (Gravari-Barbas, 2018, 7). However, while a number of DMOs expected substantial advantages and benefits in terms of tourist attractiveness, following being awarded with a World Heritage recognition, (Canale et al, 2019; Cuccia et al, 2016; Yang et al., 2010; Patuelli et al., 2013; Su and Lin, 2014) some of the expectations failed to materialise in a number of instances. The research available in this topic failed to "reaching unequivocal results" (Canale et al, 2019, 114; Yang et al (2014). As a result Canale et al (2019, 114) refer that does not exist consensus on the subject of the "tourism-enhancing effect of (World Heritage Site) WHS". In fact, Canale et al (2019), based on a meta analysis consider the effect to be insignificant. Nevertheless, the authors consider that it does not mean that WHS effect doesn't exist at all. As a consequence, the process of heritagization must be analysed on a case-by-case approach, from an entirely realistic perspective, and assuming many possible outcomes.

As mentioned in the introduction this paper focus on the Quintas da Madeira product, currently advertised a boutique hotels. The following analysis will provide a number of insights on the subject. Jones et al (2013, 716) define a boutique hotel, in spite of a "lack of clear and established definition" of the concept, based on a number of characteristics, such as a privileged location, personal service and the uniqueness of the hotel from a cultural, historical or architectural point of view. The experience being offered by the hotel (McIntosh and Siggs, 2005; Aggett, 2007; Lea, 2002; Van Hartesvelt, 2006; Day et al 2012; Yan and Lin, 2014) and the limited number of rooms (Jones et al, 2013; Lim and Endean, 2009; McIntosh and Siggs, 2005; Morrison et al, 1996; Wheeler, 2014; Aggett, 2007) are similarly pointed out by a number of authors, as key feature of this market niche. Another importance feature relates to price and category, with a number of boutique hotels advertised as luxury hotels (Heo and Hyun, 2015; Lockyer, 2002; Lockyer, 2005). However, O'Connor (2008) and Rogers (2009) consider that boutique hotels can be placed both on the low and upper end of the price scale. Design is another important feature of boutique hotels and Lim and Endean (2009, 38) and Aslam and Jolliffe (2015) highlight the building itself in terms of architectural details and past history, plus the "internal design features of the hotels" as an important aspects of the experience and marketing approach (Bissell, 2005; Caton and Santos, 2010; Catrina, 2016; Cheer and Reeves, 2015; Nasser, 2003; O´Connor, 2008). The authors noted that the term "individual" is pointed out by in most marketing campaigns. Not surprisingly, the concepts of boutique and lifestyle hotel are regarded as interchangeable. Jones et al (2013, 717) mention that lifestyle hotels offer the consumers the opportunity to "take their lifestyle or the lifestyle to which they aspire "on the road"", which is particularly important for customer-centric clients (Featherstone, 1991; Watkins, 2010; Wilson, 2006; Ballesteros and Ramírez, 2007; Boyd, 2001; Hassan et al, 2002; Henderson, 2011; Peleggi, 2005; Sklair, 2010). By the same token, The Boutique and Lifestyle Lodging Association (BLLA, 6) defines lifestyle hotel "as a subcategory of boutique hotel" and defines it "as a property that combines living elements and activities into functional design that gives guests the opportunity to explore the experience they desire". Both concepts (boutique and lifestyle hotel) are seen by the industry as opportunity to be competitive in emerging cultural tourism market based on differentiation, life-style concerns, cultural and socio-economic aspirations (Baum and Haveman, 1997; Liu et al, 2015; McNeil, 2008; Mendiratta, 2013; Ong et al, 2015; Pearce and Moscardo, 1992).

Given the multitude of existing motivations to make a reservation in a boutique hotel, developments heritage tourism market must adopt an encompassing view, by not focusing only on technical aspects pertaining the hotel´ architecture, culture and history, but also on the experience demanded by guests (Weaver and Oh, 1993; Weiler and Yu, 2008; Yoo and Lee, 2015; Hausmann, 2007; Johnston-Walker, 1999; Josiam et al, 2004; Kastenholz et al., 2012; McIntosh and Prentice, 1999; Nguyen and Cheung, 2014; Uriely, 2005). To take into account consumer expectations and motivations in this market niche in particular, a few notes on the main characteristics of the tourism experience are required. The concept of experience economy offers a fertile ground in this regard. Pine and Gilmore (1998) characterised four 'realms' of the consumer experiences based on two levels of analysis, i.e, the degree of customer involvement in the experience (defined as passive versus. active participation); and the customer degree of engagement or connection with the experience (measured as absorption vs. immersion) (Dann, 1996;

Prentice, 2001; Vesey and Dimanche, 2003). Based on Pine and Gilmore (1998) and Oh et al (2007), the four realms of the experiences are labelled as educational (centred on active and absorptive aspects); escapist (based on active and immersion related aspects); entertainment (centred on passive and absorption related aspects of the experience); and aesthetics (based on passive and immersion related aspects). Oh et al (2007, 121) refers that "in aesthetic experiences, tourists enjoy being in the destination environment", as "they passively appreciate, or are influenced by, the way the destination appeals to their senses, no matter the level of authenticity of the destination environment". In such cases experiences provide an opportunity to "let them just be there.". According to Oh et al (2017, 121), "entertainment experience occurs commonly when tourists passively observe activities and/or performances of others, including listening to music and reading for pleasures at destinations". The escapist experience is related to issues of immersion and participation and related to issues of "tourists' escape from their daily life is viewed as a timeout leisure activity that is necessary for healthy functioning of their life and society" (Oh et al (2017, 122). The learning experience tourists "increase their skills and knowledge, either general or specific, through educational experiences at the destinations they visit" (Oh et al, 2017, 121). The learning experience appeal to visitors´ desire to learn something more about the region´s cultural background.

METHODOLOGICAL APPROACH AND RESULTS

Methodology

This study was devised to understand the key motivations driving tourists to make a reservation in one of the Quintas da Madeira. The data was collected from guests who stayed in such facilities over a period of 12 months from January 2014 to January 2015. In total 10 Quintas agreed to participate in this research project. The survey was distributed to the receptionist, which, in turn invited guests to answer the survey questionnaire after they had stayed at least one night. The research team collected the questionnaires every fortnight. The survey was based on a two pages self-administrated questionnaire devised to gather data on a number of issues, namely motivations and socio-demographic data. In total we get 415 answers.

The questionnaire was devised based on an in-depth analysis of the literature (Oh et al, 2007; Chen and Chen, 2012; Cheng et al, 2016; Chhabra et al, 2003; Chhabra, 2015; Dinçer and Ertuğral, 2003; Lwin et al, 2014). Respondents were invited to rate the degree of importance of 18 items in relation to their motivations to stay in one of the Quintas. Such items were based on an adaptation of the measurement scale validated by Oh et al (2007), in their study of the four realms of the experience within the context of the B&B accommodation. Examining the reasons behind the rationale to choose this particular market niche demands an in-depth analysis of both motivations to travel and lifestyle considerations. For that reason, respondents were similarly asked to indicate the main reasons to travel to the region. And respondents were invited to provide a number of information regarding their socio-demographic background (age, monthly income, nationality, gender and academic background), travel arrangements (party size, anticipation) and knowledge on the Quintas product and past experiences with similar products. Basic (descriptive) statistics were calculated to explore the data and to identify simple measures such averages and frequencies.

Results

The sample profile shows that 14.5% of the respondents were British nationals, 11.6% were French nationals, 39.8% were German nationals, 4.6% were Portuguese nationals, and 29.6% from other countries. A number of other aspects are presented in table 11.1. As can be seen tourists are mainly male (50.8%), predominantly relative old, as 37.6% were above the age of 60 or more. Respondents in the sample exhibit an average level of education, with 26% of respondents with an undergraduate diploma, and 21% with a high school diploma, and 13% with a PhD diploma. In average, respondents earn 2740 euros. About 49.2% of the respondents opted in first place for this type of accommodation and about 71.1% of the respondents are travelling to the island for the very first time. Overall, the figures provided so far are in line with the official statistics available, in most cases. However, striking differences, in terms of shares of the different nationalities identified in this study, are all too apparent, particularly as regards the share of Portuguese nationals. As can be seen, respondents were entirely or mostly satisfied with their current experience, and about 70.5% of the visitors intend to visit again.

In line with Pine and Gilmore (1998) and Oh et al. (2007) we grouped the motivations according to the four 'realms' of the consumer experiences. The four realms of the experiences are labelled as: educational (to capture visitor´s interest in learning and experience both the island´s and Quintas´ cultural and historical resources); escapist (centred on respondent´s interest in getting a break abroad to relax in a calming and charming environment); entertainment (centred on passive aspects of the experience and/or access to activities, tours and points of tourist interest); and aesthetics (based on the consumption of landscapes, "access" to microclimates and gardens offering thermal comfort as well as lifestyle-concerns transcribed in being hosted in an out of ordinary building) in table 2.

The aesthetical dimension includes the items "aesthetical elements of building, gardens and landscape", natural and cool climate", "architectural aspects and the quality of the building", "the quality of the gastronomic experience". The escape dimension includes the following aspects: "an experience to be lived with the family", "to escape to a genuine and cultural environment", "non-crowded type of tourism", "excellence in the welcome and hospitality", "to find out new experiences", "to feel disconnected in a different and relaxing place". The entertainment dimension includes aspects such as "to experience living memories of the traditional lifestyle of the local aristocracy", "to live a new experience in an out of ordinary building", "access to outdoor and/or sportive activities", "ease in the access to other places (e.g.: restaurants, museums, gardens, etc.)", and "a good price/quality ratio". The learning dimension includes aspects such as "starting point to visit monuments and traditional constructions in the surrounding areas", "to enrich the knowledge of the rural, historical and cultural heritage" and "to do activities connected with the Madeira's tradition.

As can be seen esthetical elements predominate in terms of the motivations underlying the decision-making process (mean 4.13). Our results are in line with Silva and Prista (2016), Taylor (2001), Vong and Ung (2012) and Strannegård and Strannegård (2012), to the extent that easily discernible aesthetical elements are clearly preferred by respondent over more demanding aspects of the Quintas experience (Waitt, 2000). However, the escapist dimension is also important. As observed by Oh et al (2007, 121), travelling abroad offers an opportunity to escape from daily life social, familiar and work commitments, in order to recharge batteries, before "return to the routine after experiencing the extraordinary" (See also Osti et al, 2001; Dolnicar and Otter, 2003; Peleggi2005; Zeppal and Hall, 1991). Based on Gross (1961), Oh et al (2017, 121) understand escapism as an opportunity to enjoy "a "timeout" leisure activity" pursued by health reasons. In the same line, Boorstin (1964) and MacCannell (1973) (quoted in Oh

Table 1. Vital Statistics

	Share/mean
Nationality	
British	14,5%
French	11,6%
German	34,7%
Portuguese	14,6%
Other	29,7%
Gender	
Female	50,1%
Male	49,9%
Age	53 years old
Civil Status	
Single	16,9%
Married	73,3%
Window	7,5%
Academic background	
High School	31,6%
Undergraduate diploma	24,8%
Master/phD	34,0%
Income	3190 euros
First Stay in this kind of Building	55,70%
Previous stays	21,50%
Previous knowledged based just on a visit	22,90%
Previous stays in simmilar buildings in other countries	49,50%
First Visit to the region	71,10%
Antecipation	
Less that one week	12%
Less than a month	34%
1 to 3 months	40,70%
A year	13,30%
Average stay	10,5 days
Degree of satisfaction with the lodger	4,44
Willingness to repeat the experience	93,70%
Willingness to recommend	95,70%
Image of Madeira	4,35

et al, 2007, 122) consider that the need for a break results from tourists living “inauthentic, alienated lives” interest in enjoy an “occasionally escape”. Our results suggest that, in the case under examination, such breaks must be coupled with high-quality accommodation in an aesthetical pleasant environment

Table 2. Motivations driving tourists to the Quintas

Items	Mean	St. Dev.
Aesthetical elements	**4,13**	
Aesthetical elements of building, gardens and landscape	4,22	0,846
Natural and cool climate	4,24	0,898
Architectural Quality of the building	4,07	0,918
The quality of the gastronomic experience	3,99	0,881
Escape	**3,92**	
An experience to be lived with the family	3,56	1,226
To escape for a genuine and cultural environment	3,78	0,921
Non-crowded type of tourism	4,06	0,878
Excellence in the welcome and hospitality	4,39	0,855
To find out new experiences	3,86	0,989
To feel disconnected in a different and relaxing place	3,88	0,951
Entretainment	**3,73**	
To experience living memories of the traditional lifestyle of the local aristrocracy	3,22	1,223
To live a new experience in an out of ordinary building kind	3,56	1,088
Access to outdoor and/or sportive activities	3,73	1,060
Ease in the access to other places (e.g.: restaurants, museums, gardens, etc.)	3,97	0,910
A good price/quality ratio	4,14	0,824
Learning	**3,75**	
Starting point to visit monuments and traditional constructions in the surrounding areas	3,84	0,968
Enrich the knowledge of the rural, historical and cultural heritage	3,84	0,951
To do activities connected with the Madeira's tradition	3,58	1,051

offering thermal comfort and a sense of indulgence, wellbeing and tranquility. Both entertainment and learning aspects are clearly less important, and the opportunity to learn more about the building and surrounding areas is dismissed by large number of respondents.

The analysis of the determinants of satisfaction confirms the results and analysis provided so far. A stepwise regression was performed to identify the factors impacting satisfaction. In the first stage of the analysis we considered a number of factors such as socio-demographic variables (age, income, gender, nationality and income), previous experience with the current product, product related motivations (labelled above as aesthetical, entertainment, escape and learning) and island´s related (motivations to visit) variables. The results (Table 3) indicate that the most important factors influencing satisfaction with the current accommodation service are the overall degree of motivation to visit the island (as measured by the sum of the scores attached to ten different islands´s attributes), the aesthetical factor identified above, being a repeat visit and the number of attraction visited.

Table 3. Determinants of satisfaction

Dependent variable: satisfaction	Coef.	P>t
Number of attractions visited	-0,0395	0,006
Repeat Visit	0,1182	0,090
Motivations to Visit the Island	0,0172	0,006
Aesthetical factor	0,0599	0,000
Cons	1,9585	0.000
R^2:0,275; F=3,65; Sig=0,000		

It should also be note that there is a positive correlation between each dimension of the motivations to stay and satisfaction related variables such as satisfaction with the accommodation facilities, satisfaction with the current holiday and image of the destination, as can be seen in Table 4. Guests are cognizant about the local industry advantages and their degree satisfaction was affected by their perceptions on the topic of the current advantages of the destination as a whole.

Based on these results, a number of conclusions can be drawn with respect to the relationship heritage tourism and competitiveness. Firstly, the sector´s prospects are clearly dependent on offering products mixing a number of the current competitive advantages of the destination as a whole (e.g. price quality ratio, landscapes, etc.), with easy-to-enjoy architectural, cultural and identity particularities, in line with the results of Remoaldo et al (2014). Betting on learning charged aspects may be counterproductive for the time being, owing to the reduced number of tourists eager to enjoy cultural charged products in a formal (academic) way. This is not to say that such an approach is completely irrelevant, because a sizeable number of respondents is rather interested in the cultural and architectural richness of the building. As noted by Oh et al (2007, 123), the degree of relative importance of the four realms of experience dimensions should be interpreted in a flexibly manner “in light of the marketing focus implemented by the targeted company or destination”. Secondly, further research is needed to understand customers´ preferences and products types that will be welcomed by tourists driven by escapist and aesthetical reasons.

Table 4. Correlations between key satisfaction indicators

	Sat.1	Sat.2	Aest.	Esc.	Lear.	Ent.	Ima.	Mot.
Sat.1	1	…	…	…	…	…	…	…
Sat.2	0,4971*	1	…	…	…	…	…	…
Aest.	0,3198*	0,4843*	1	…	…	…	…	…
Esc.	0,2768*	0,4087*	0,6359*	1	…	…	…	…
Lear.	0,2277*	0,3176*	0,5443*	0,7742*	1	…	…	…
Ent.	0,2540*	0,3612*	0,6342*	0,7474*	0,7642*	1	…	…
Ima.	0,3424*	0,5246*	0,5491*	0,2805*	0,2201*	0,3095*	1	…
Mot.	0,3027*	0,4290*	0,6648*	0,6233*	0,5984*	0,6056*	0,4404*	1

Sat.1 (Satisfaction with holiday); Sat.2 (Satisfaction with accommodation); Aest(Aesthetical); Esc (Escape); Learn (Learning); Ent (Entertainment); Ima (Image); Mot. (Motivations to travel to the Island)

*:Significant at 1%

Heavy structured and complex learning opportunities may be rejected, but customers may be receptive to understand aspects of the Quintas that relate to their own interests and hobbies (e.g. gardens, botanical aspects, the discoveries). For that reason, it matters to understand which areas of interest should be developed by sector, and to what extent respondents want to enjoy really authentic and truly immersive experiences (Wang, 1999; Victorino et al, 2005; Taylor, 2001). Thirdly, the current experience in dealing with a product with such close connections to the island´ history and identity offers the opportunity to learn by trial and errors about the best approach to motivate visitors to get in contact with the current stock of resources. Experiences can be shared, experts (historians, academics, ONGS working on the topics under analysis) called in, and entrepreneurial ventures financed to help the tourism industry to accumulate experiences, entrepreneurial resources and qualified personal in dealing with the heritage tourism sector.

CONCLUSION AND RECOMMENDATIONS

In this paper we attempt to analyze the prospects of upgrading the level of competitiveness of Madeira Island based on the development of the heritage for tourism purposes. In line with Oh et al (2007), the results suggest that the esthetic dimension of the Quintas exhibit the highest mean and the higher degree of correlation with satisfaction. Visitors prefer and greatly appreciate the aesthetical elements of the buildings and surrounding areas, which indicates that such elements must be emphasized in future marketing campaigns. Such an approach is less investment oriented compared to other initiatives, which actually, it is very positive, owing to the economic situation. For decades, the DMOs conveyed abroad an image centered around the landscapes, mild climate and slow pace of life. For the time being, it is necessary to take into consideration that such destination specific factors are highly important and decisive in terms of tourists´ decision-making processes. Any attempt to develop market niches and competences should always bear it in mind this aspect.

The prospects of the heritage sector are utterly dependent on tourists' satisfaction with the current experience. It is also clear the overall impact of image on satisfaction as visitors' understandings with regards to the island´s main advantages clearly influence their satisfaction with the Quintas product. Based on the results provided so far, it is undeniable that the esthetical and escapist dimensions have a unique level of influence on tourist satisfaction. Both the escape and learning dimensions are clearly less important in explaining satisfaction. Our results indicate that respondents perceive the current stock of resources as an opportunity to enjoy beautiful landscapes, to indulge in relax and recovery activities.

This study has to offer a number of practical contributions to the discussion about competitiveness reinforcement via heritage tourism. Firstly, it is well evident that developments in this regard are clearly dependent on highlighting the current advantages of the destination (mild and pleasant climate, beautiful landscapes, gastronomy and sense of exclusivity) through the development of products that incorporate a number of amenities closely related to the island main competitive advantages. Moreover, as the learning dimension appears as less important it matters to further the analysis based on other methodological approaches (discrete choice models and conjoint analysis) in dialog with the sector managers, in order to identify business models and products that can attract more culturally oriented tourists. As the escape related dimensions are also highlighted in this study, hoteliers, destination managers and DMOs officials must give careful consideration to issues of soft-health related programs, welcome and hospitality, and opportunities to enjoy meaningful interactions with the staff members knowledgeable of the hotels resources and to learn more about the local culture (should they be interested), and to access to local history and culture. As a number of respondents is interested in getting more information and adequate interpretation schemes must be available. Guides and other resources must be available, and destination managers must excel in providing more resources in terms of information. Destination managers should also develop and promote institutional and public –private partnerships centred in encouraging the local trade, higher education institutions, and private operators in participate in planning, implementing and up-grading informational resources. The consideration of local knowledge in the history of the region, the introduction of clearly defined priorities in terms of the production of services and relevant content should be pursued to signal the interest and commitment of the region in providing tools to sustain a high-quality experience. That is, the development of the heritage sector offers opportunities to develop a wide range of competencies still in its infancy, with far reaching impacts.

A major limitation of this study lies in the timeline of the data recollection process. Although the data is four years old, the main recommendations are still valid as because no information or evidence emerged that such recommendations were followed or translated in specific actions, according to a representative of the sector. A major reason for this lies in the very fact that the sector as a whole is still growing at a rapid pace, which helped to create a sense of lack of urgency in the need to introduce a number of improvements and strategic movessiam.

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Chapter 12
Knowledge and Technology Transfer in Tourism SMEs

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ABSTRACT

This chapter analyzes the dynamics underlying the mechanisms of transfer of knowledge and technology between academia and the tourism industry. Two interviews and research were applied to managers of SMEs. SMEs consider highly educated employees central to the knowledge transfer process, but do not give any incentive to their employees to graduate. It is not always possible to recruit young talents from higher education, as they prefer to go to work for large metropolises. The main barriers for collaboration in R&D academia-industry in the tourism sector are the cost, lack of interest on the part of higher education institutions, and the bureaucratic and time-consuming process. Regarding networking, SMEs agree that they create value, but also consider incorporating a regional innovation ecosystem. SMEs should use a competitive differentiation strategy.

INTRODUCTION

In the past few decades, we have witnessed an increasing interest in the transfer of knowledge by political and academic decision-makers. Knowledge transfer is directly associated with the capacity for innovation, which consequently will impact socio-economic systems. Therefore, it is now recognized that we live in the era of a knowledge economy, where educational institutions have been progressively assuming a relevant role as they are the sources of the production and diffusion of new knowledge. Thus, higher education institutions are fully aware of the significant role they play. Nonetheless, many of them are

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frozen in time and do not adapt their courses to the actual needs of the market. In this context, the transfer of knowledge from higher education institutions to the industry is a concern for all regional stakeholders (Cooper, 2006; Hardy, Vorobjovas-Pinta, & Eccleston, 2018; Hawkins, 2006; Kathoefer & Leker, 2012).

The idea that higher education institutions can contribute to increasing the competitiveness of regional economies has been emphasized in recent decades. Starting in 2014, there was a paradigm shift in regional policies implemented in Europe. These new policies are called research and innovation strategies for smart specialization (RIS3) (Capello, 2014; Thomas, 2012).

In this context, when the areas of smart specialization were defined in Portugal, most regions defined tourism as an important sector for their economies (Lopes, Farinha, Ferreira, & Silveira, 2018). There has been a great number of scientific articles related to knowledge management and knowledge transfer in the literature in general. However, this theme within the tourism sector has been little explored (Shaw & Williams, 2009). Small and medium-sized enterprises (SMEs) in the tourism sector find it difficult to perceive the usefulness of knowledge transfer in the sector (Cooper, 2006; Smith, 2006). Thus, there is a need to better understand how we can conceptualize and theorise knowledge transfer in tourism and to call for more empirical work (Cooper, 2002; Shaw & Williams, 2009).

We will use a qualitative methodology, analyzing two SMEs in Portugal in the tourism sector. You want to check how the knowledge and technology transfer academy is carried out in the tourism sector. The importance of the creation of networks for tourism SMEs in the creation of competitiveness and wealth will also be determined.

It is hoped in this way to contribute to clarify the academic community, tourism companies and regional government in the way Technology Transfer can be done in the tourism sector. It is also intended to leave suggestions for new regional policies to be developed in the subject under study in order to accentuate the socio-economic growth of the regions.

The remainder of this paper is structured as follows. Section 2 presents the literature review before detailing the methodology in section 3 and the case study in section 4. Finally, section 5 sets out the conclusions, limitations and future lines of research.

THEORETICAL BACKGROUND OF KNOWLEDGE TRANSFER IN TOURISM

The transfer of knowledge in the tourism sector is a relatively recent issue. In this sense it is important to have some general notions before we approach the subject in the tourism sector. For this it is important to know what is meant by knowledge and transfer of knowledge.

Knowledge can be defined as a fluid combination of framed experiences, values, contextual information, and expert insights that provide a framework for assessing and incorporating new experiences and information (Davenport & Prusak, 1998). The knowledge transfer can be understood as an act of transferring knowledge from one entity to another. The transfer can be carried out within and between companies, between public and private sector organizations, between producers and clients (tourists), local community and between this community and tourist organizations. In the literature, many channels are identified through which knowledge can flow, such as seminars, observations, trade press and trade associations, labor mobility and networks (Czernek, 2017; Shaw & Williams, 2009; Weidenfeld, Williams, & Butler, 2010).

The concept of knowledge transfer appears infrequently in tourism research. The tourism industry lags behind other industries in terms of knowledge transfer practices (Hardy *et al.*, 2018; Walters, Burns, & Stettler, 2015).

There are some motives to justify the ineffectiveness of knowledge transfer in the tourism sector. Companies in the tourism sector consider the R&D "too sophisticated" as well as "unnecessarily complicated". Companies have a preference for tools and languages that are easy to understand, implement, and suitable for the problems that companies face. Being so, the results from R&D in the tourism sector should be presented in a more simple manner so that companies can understand and take advantage of them to solve possible deviations and improve their performance. Academics have to make an effort to adapt their language to companies in the tourism sector. On the other hand, the pressure that academics are currently facing to publish in internationally quoted journals, as well as the incentives they receive, does not simplify the transfer of knowledge.

That said, it can be perceived that the transfer of knowledge between companies in the tourism sector and higher education institutions is more fruitful when collaborative networks in R&D are established. Consequently, both parties should take into account three elements: credibility, usefulness, and usability. Credibility is related to the quality of knowledge from R&D, recognized by academics, as well as by tourism companies. Usefulness is associated with the manner through which knowledge from R&D is assessed as being helpful by companies in the tourism sector. Finally, usability refers to the potential that knowledge from R&D has for application (Cooper, 2006; Hardy et al., 2018; Xiao & Smith, 2007).

In recent years several theoretical models have appeared in the literature, however, the current literature on knowledge transfer between tourism companies and higher education institutions is still trivial, and its study is pertinent (Bouncken, 2002; Czernek, 2017; Hallin & Marnburg, 2008; Hardy et al., 2018).

Thus, knowledge flows are an important element in the performance, competitiveness and innovation of tourism organizations. These streams of knowledge fall into two categories. Knowledge can flow intentionally through the (managed) "transfer of knowledge" or unintentionally through "knowledge overflows" (Makkonen, Williams, Weidenfeld, & Kaisto, 2018; Shaw & Williams, 2009; Weidenfeld *et al.*, 2010).

METHODOLOGY

The qualitative and exploratory approach employed in this research will allow to develop, clarify and modify concepts and ideas. The qualitative research is especially appropriate to understand the perceptions of the actors, allowing to conceive and deepen new perspectives of knowledge, contributing also to the enrichment of the theory on the transference of knowledge in the tourism sector. For the analysis of the present study, the quantitative approach is not the most adequate, since it fails to capture the essence of the phenomena in certain areas of greater complexity. The use of a case study allows us to verify a peculiar reality, helping to better understand the facts through an in-depth investigation of the operations, assuming itself as an alternative methodology of research, in increasing use (Jonsson, Baraldi, & Larsson, 2015; Lopes, Farinha, & Ferreira, 2018; Yin, 2015).

Regarding the unit of analysis, 2 SMEs of the tourism sector were considered located in Portugal. The two SMEs were selected for inclusion in regions where tourism is one of the smart specialization

Table 1. Unit of analysis

Firm	District	Region RIS3	Nº of Employees	Nº of Employees with higher education	Services
A	Leiria	Centro	4	2	Travel planning (application, advice, visa, airfare, transfer, VAT number, user number, Foreigners services and borders, equality status, accommodation and other services related to academic and professional tourism)
B	Faro	Algarve	120	15	Transportation of tourists (Tourist guide, quadricycle tours, airport transportation, hotels)

domains selected for RIS3. A survey structured largely from open questions was applied to two of the company managers based on Lopes, Farinha, Ferreira, and Ferreira (2018) and Czernek (2017) (Annex). The questionnaire was applied in March 2019.

CASE STUDY ANALYSIS AND PRESENTATION

Presentation

Knowledge is widely considered a key element in any organization and must be adequately addressed to ensure a competitive advantage. In this sense, knowledge in the tourism sector is equally fundamental. When knowledge is integrated into key business systems, its availability to employees is important, since knowledge that is not available is useless. Thus, it can be said that if higher education institutions do not disclose their knowledge in their respective business sectors, this knowledge becomes useless (Barcelo-Valenzuela, Carrillo-Villafaña, Perez-Soltero, & Sanchez-Schmitz, 2016).

For the present study two SMEs were considered (Table 1). SMEs are firms with fewer than 250 employees and a turnover of less than € 50 000 000 per year.

Firm A was founded in 2011. The target audience are young tourists, as the enterprise considers them an important force for development, social change and to drive sustainable development in the tourism sector in Portugal. The firm A focuses more on foreign students who want to come to study and get to know Portugal. It offers a set of services that allows the tourist not to worry about anything. Firm A does travel planning, assists in applications for higher education, advice, airline ticket, transfer, accommodation and requires several documents. It also provides other services related to academic and professional tourism.

The firm B was founded in 2010 as a travel agency. However, it is currently a specialized transfer agency. They are almost exclusively dedicated to tourists and business travellers, providing private and chauffeured transfers in the Algarve, Lisbon, Alentejo and southern Spain. They are also specialists in golf transfers and clubs of the most diverse sports.

Results and Discussion

We present and discuss the results. Initially, we tried to understand whether firms in the tourism sector a policy had of encouraging higher education. Firm A indicated that they have a preference in hiring international students and recent graduates. They recognize that it is they who make the connection to the academy. Concerning firm B, it indicated that it did not have any type of policy for training. In general, firms in the tourism sector are hiring on a seasonal basis, preferring to hire part-time employees.

In this context, SMEs do not effectively bet on the knowledge that their human resources have. Workers in the tourism sector as they constantly shift work the transfer and absorption of knowledge is hampered. When they change jobs, they transfer with them the tacit knowledge acquired in the previous place of work. If they change their profession, this knowledge is partially or completely useless. Concomitantly, acquiring "new" tacit knowledge appropriate to a new workplace takes a long time. Workers in the tourism sector are not motivated to take a college course because companies prefer unskilled labor with a low-wage policy (Czernek, 2017; Riley, Ladkin, & Szivas, 2002; Williams, 2014).

As it is easy for the firm to attract young talents trained in higher education institutions, firm A has indicated that it does not have any problems in recruiting, since young people are looking for a first opportunity to work. Firm B indicated that it had difficulties in recruiting talented young people with higher education, who preferred to go to large centers such as Lisbon and Porto. As Lisbon and Porto are the largest cities in Portugal, young people are looking for better working conditions that they cannot have in other parts of the country. Efforts to promote the development of human resources for tourism have been focused on cultivating people for the needs of lodging establishments with the restricted purpose of satisfying tourists by providing quality services. Thus, companies do not consider the needs that human resources themselves seek. The local population must be the main source of work and should receive a reasonable remuneration for their work, but this can only occur if they are trained properly to take advantage of the opportunities that tourism can offer (Liu & Wall, 2006).

The two SMEs also report that they regularly receive higher education trainees. They identify as a bigger gap the fact that they do not know the reality in the sector, as well as the fact that they do not have enough knowledge in digital marketing tools. However, they indicate that they are an added value for companies because they bring new knowledge by getting different applications of the available data. They also point out that when they must recruit a new employee, one of the recruitment facilitators they consider is the candidate's experience in the market.

Internships should not be a means of "cheap labor," and efforts must be made to ensure that students are engaged and inspired by their experience. Students should be placed in positions that enable them to gain a practical and broad view across multiple departments / sectors, rather than being restricted to an area that is unlikely to offer a satisfactory experience (Walters et al., 2015).

Tacit knowledge, which includes market experience, unlike explicit knowledge, is not included in documents, databases, legal acts and other sources of information. In this sense, it is difficult to transfer, measure and record this knowledge. Companies gain tacit knowledge over years of experience and this differentiates a particular entrepreneur, organization or region from others, constituting an important competitive advantage factor (Czernek, 2017; Nonaka & Takeuchi, 2007).

The SMEs also indicated the main difficulties encountered in the transfer of knowledge between tourism companies and higher education institutions. Firm A indicates that it is easier to relate to the international relations offices of higher education institutions. It also states that higher education institutions do not give due attention to the destination of Portugal, in addition to leisure tourism. The firm B states that higher education institutions have little interest in knowledge transfer, and it is a very time-consuming process.

The knowledge transfer requires a high level of confidence, which can be hampered by a high level of competition among the actors in a tourist region. Tourism companies should consider and know how to efficiently manage tacit and explicit knowledge resulting from the transfer of knowledge. Firms prefer that research projects be carried out in the short term, so that problems can be solved as quickly as possible. For higher education institutions, research projects must be carried out in the long term. SMEs have a limited ability to absorb knowledge, as they usually have limited resources and a lack of management experience. (Brown & Duguid, 2001; Cohen & Levinthal, 1990; D'Este & Patel, 2007; Scott, Baggio, & Cooper, 2008).

Invited to address R & D collaboration, the firm A does not cooperate with higher education institutions in R & D projects because they are not open to doing so. The firm B indicates that sporadically participate in R & D projects with higher education institutions. They indicate that the knowledge generated is important for the growth of the company. Firm A indicated that it does not have the financial capacity to pay R & D because it has limited financial resources. The firm B would consider paying R & D to higher education institutions to create a sustained competitive advantage by retaining this knowledge for themselves.

The university-industry collaboration plays an important role in the success of R & D projects. One of the major challenges of university-industry collaboration is the identification of appropriate partners. Because of the problem of information asymmetry, it is difficult for SMEs to identify researchers from higher education institutions to collaborate on their R & D projects (Wang, Ma, Liao, & Du, 2017).

Companies indicate that the main barriers encountered for collaboration in R & D academia-industry in the tourism sector are cost, lack of interest on the part of higher education institutions, bureaucratic process and long period for the results to be known.

One of the main barriers to be taken into account in the cooperation between academia and companies is the differences between the main objectives and the mission, which is reflected in the raison d'être of each of the parties. The quality of the results of the researchers in higher education institutions can be conditioned by lack of experience in the business sector. Many of the problems facing a cooperation agreement with the business sector are related to the high turnover of staff and the lack of continuity in business research strategies (Ankrah, Burgess, Grimshaw, & Shaw, 2013; Muscio & Vallanti, 2014; Ramayah, Lee, & In, 2011).

The barriers encountered in the academia-industry cooperation relationship can be minimized by introducing some mechanisms that play the role of intermediation between higher education institutions and the business sector. One such example is the technology transfer office, or those of science and technology parks (Bruneel, d'Este, & Salter, 2010; Lopes, Farinha, Ferreira, & Ferreira, 2018; Neves & Franco, 2018).

We surveyed firms in which areas or themes in the tourism sector should be explored by higher education institutions in R & D activities. The firm A indicated a theme "Portugal - The Best Tourist Destination for the CPLP (Community of Portuguese Language Countries)". The firm B considered information technology and artificial intelligence, important topics to be explored in the tourism sector.

As a rule, SMEs are unable to achieve economies of scale in providing research information. Thus, their attitude is reactive in support of proactive (Pechlaner, Abfalter, & Raich, 2002; Ryan, 2001).

As far as networking is concerned, companies agree that they create value. Firm A understands that in this way they become more agile. Thus, the company does not execute the entire process of creating new tourism products / services. The manager of firm A indicates that "working with faithful partners, we exceed the expectations of our customers throughout the national territory". Firm A would also like to belong to networks of sectoral associations. Firm B considers networking to be of added value because with knowledge sharing it is possible to find and develop solutions more quickly. The firm would like to integrate the NERA - Business Association of the Algarve Region.

For the creation of networks to be efficient and dynamic, there must be an early and effective communication of the new tourist enterprise plans by the regional governments to the stakeholders. Thus, collaboration among the various network members and / or regional stakeholders can exploit the potentials generated. In this way, commitment and trust have an influence on the extent of collaboration between tourism SMEs. Tourism SMEs prefer to be part of long-term networks (Medina-Muñoz & García-Falcón, 2000; Ramayah *et al.*, 2011).

As to whether companies would consider being part of a regional innovation ecosystem, the two companies indicated that yes. Firm A believes that it is on the right track and aligned with the guidelines for strengthening / developing the specific sector of academic tourism in Portugal, impacting the economy in a relevant way, mitigating the effects of the negative population balance and the effects of seasonality for the tourism. Firm B states that they are pioneers in the sector and that they would add value to a regional innovation ecosystem.

SMEs by being incorporated into a network is a way of overcoming internal constraints in the innovation process. As a rule, regional networks include competitors, suppliers, knowledge centers and a variety of actors, who also participate in social activities (Gellynck & Vermeire, 2009; Lopes & Franco, 2017).

When companies are part of innovation ecosystems innovative capacity tends to increase especially if they adopt a system of open and collaborative innovation (Guimont & Lapointe, 2016).

In the last question, it was asked how higher education institutions can help tourism companies to create value and competitive advantage in the market. Firm A and firm B state that higher education institutions must disseminate new knowledge from R & D more frequently and in a simple way. Firm B also states that higher education institutions must present solutions for the sector by building innovative and differentiating services. They must adjust R & D to the firm needs in the tourism sector.

The large number and variety of entities that operate in different areas and at different scales hinders the communication and transfer of knowledge. Moreover, differences between actors, such as a different culture or language, do not create favorable conditions for trust between the entities that generate knowledge and those who can use it. The fragmentation of tourism activity also results in physical distance between entities, which sometimes interrupts the transfer of knowledge (Campos, 2014; Hjalager, 2002; Weidenfeld et al., 2010).

Tourist entrepreneurs perceive scientific knowledge as unnecessarily complicated and overly sophisticated. Instead, they prefer tools that are easy to apply and provide quick fixes for problems (Jenkins, 1999; Ritchie & Ritchie, 2002).

CONCLUSION

The present study aims to verify how the academic knowledge and technology transfer is carried out in the tourism sector. The importance of creating networks for tourist SMEs in creating value and competitiveness was also discussed. In the transfer of knowledge human resources are fundamental mainly in the tourism sector. It has been found that it is not always easy for SMEs to recruit young talents with training in higher education. Young talent tends to seek job opportunities together with big cities. The reason is, as a rule, that companies located in large metropolises offer better working conditions and possibilities for career advancement. Policy makers should pay special attention to this factor in the tourism planning they produce. On the other hand, tourism SMEs must go beyond the propagation of a simple, marketing-oriented growth philosophy to meet the needs and opportunities of human resources (Liu & Wall, 2006).

Higher education institutions must incorporate into their tourism courses a curricular unit where students can work on digital marketing tools. For institutions that already have a curricular unit in this subject, the contents must be updated and reinforced according to the needs of the companies in the sector (Walters et al., 2015).

As SMEs consider experience in the sector as one of the main gaps that higher education students have, higher education institutions should establish partnerships with companies in the tourism sector. In this way, they will enable students as soon as they finish their higher education to do the professional internship, thus accumulating more experience. Thus, the pupils' inexperience factor was diminished, and higher education institutions would have another advantage to present in the recruitment of new students, transferring knowledge to be more efficient (Czernek, 2017).

For the transfer of knowledge to be more efficient, regional governments must make better use of the resources that their regions have. In Portugal, in general, all regions have business incubators, but many do not allow any type of business to be incubated. Some incubators only accept companies specifically from one sector or another. Thus, regional governments should refocus the strategies of existing incubators to accept companies in the areas of RIS3 specialization that have been previously defined (Lopes, Farinha, Ferreira, & Silveira, 2018).

Higher education institutions should respond with greater celebrity to the problems that SMEs in the tourism sector have. As the process of creation and transfer of knowledge is extensive, when the results are known, sometimes they no longer fit the current moment of the sector. The tourism sector is constantly changing and it is necessary for higher education institutions to keep up with the constant changes (Jenkins, 1999; Ritchie & Ritchie, 2002).

Higher education institutions should offer more and better conditions to their researchers so that the results are transmitted in a timely manner. In this context, regional governments should reinforce R & D incentives and their knowledge transfer. In turn, SMEs have to view R & D as an investment and not as a cost.

In order to overcome the barriers encountered for university-industry collaboration in the tourism sector SMEs have stated that the collaboration process must be less bureaucratic for companies to participate (D'Este & Patel, 2007). Firm A also recommended the development of an ecosystem within the institutions of higher education that could welcome the startup of the sector. However, as far as networking with other companies is concerned, the two companies indicate that it is a good option for knowledge sharing and transfer.

Higher education institutions can help companies in the tourism industry create value and competitive advantage in the market by spreading new knowledge from R & D more often and in a simple way. They must adapt R & D to the needs of companies in the tourism sector, as well as language (Hardy et al., 2018). In turn, firms have to see their employees as the differentiators between the competition because they are the ones who make the service. It is in the service that tourist SMEs can gain a sustainable competitive advantage by differentiating themselves from the competition, since the services offered in tourism are very similar. Compete with a low-price strategy is not the solution. SMEs should use a competitive differentiation strategy.

This study provides useful information on the transfer of knowledge in the tourism sector. Suggestions have been made to regional governments, higher education institutions and tourism SMEs for the transfer of knowledge to be more efficient and dynamic.

The limitations of the present study are inherent in all case studies, ie the results consolidated in this research cannot be generalized. The study was also limited to the region of Portugal. The present study also identified two lines of research that should be considered in future studies: 1) Portugal - The Best Academic Tourist Destination for the CPLP; 2) How can information technology and artificial intelligence influence tourism?

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APPENDIX

Questions included in the interview:

1. How many employees does your company have?
2. How many company employees have a university degree?
3. Are there policies to encourage higher education in the company?
4. Is it easy for the company to attract young talents trained in higher education institutions?
5. What are the main gaps that trainees bring from higher education institutions?
6. What is it that the human resources trained in tourism by higher education institutions add to the company again?
7. Do you consider that networking creates value for your business?
8. Would you consider being part of a regional innovation ecosystem?
9. What business and cooperation networks would you like to integrate?
10. What are the main difficulties encountered in the transfer of knowledge in the tourism sector between companies and higher education institutions?
11. Does the company collaborate in research and development (R & D) projects with higher education institutions?
12. Would the company consider paying research and development (R & D) to higher education institutions?
13. What are the barriers to university-industry collaboration in the tourism sector?
14. How can we overcome the barriers encountered for university-industry collaboration in the tourism sector?
15. What topics in the tourism sector should be explored by higher education institutions in research and development (R & D) activities?
16. How can higher education institutions help tourism companies create value and competitive advantage in the marketplace?

Chapter 13
What Do We Know About Destination Branding?

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ABSTRACT

Destination branding is a recent field of study related to tourism and marketing. Based on a categorized bibliometric analysis of 272 articles published in Thomson Reuters' journals since 2001, this chapter characterizes intellectual structure of the scientific publications about destination branding, identifies its authors' location in terms of institution and countries, and recognizes main research lines. It also provides co-citation networks of authors, journals, and their respective clusters. This analysis enhances knowledge on destination branding and supports new studies and researches in this field.

INTRODUCTION

Tourism is a very important activity for many countries, regions and cities, which promotes economic, cultural, environmental and social positive impacts when properly planned and managed (Hall & Richards, 2003). Many destination managers believe its resources are enough to interest and retain tourists, however, nowadays, the competitiveness and the complexity in consumer-behaviour are so strong, that a destination needs much more than good attractions, structure and services. Besides, tourist offices and companies' managers need to maintain their travel markets in a context where potential tourists are overwhelmed in marketing messages (Morgan & Pritchard, 2002). In this context, destinations need to have a strong brand, i.e., a set of elements that help consumers to identify and differentiate it in the

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market (Cae, 2002). That is why branding is considered an essential tool - perhaps the most powerful one - for destination marketing (Morgan & Pritchard, 2002; Usakli & Baloglu, 2011).

Despite that, the literature on destination branding is a relatively new field of study, being on the concerns of tourism scholars since the end of the 1990s (Pike and Page, 2014; Cae, 2002, Hosany, Ekinci, & Uysal, 2006). In the last decade, there has been observed a growing interest on the subject, with new studies being published, new concepts and models and case analysis. Among these new studies, however, it was not found one a with a bibliometric approach, which would a important contribution to enhance knowledge on this subject and to point gaps for future research.

Therefore, this paper aims to characterize intellectual structure of the scientific publications about destination branding, to identify its author's location in terms of institution and countries and to recognize research lines and trends. In the view of achieving these objectives, it is performed a bibliometric analysis of 272 articles, using co-citation method in order to map the relationships and structures underlying this field of study.

This paper is structured in five sections beyond the introduction. The next one presents an overview of literature and theoretical aspects of destination branding. The following points out method issues. After that, results are presented and, then, the last section concludes the paper and points out limitations and suggestions for new investigations.

Theory Notes

Destination branding is closely related to place branding, which is dedicated to the process of creating, sustaining and shaping a favourable identity for places (Boisen, 2015) whether they are a nation, a region or a city. Place branding, however, goes beyond tourism, as it can have other goals, such as to promote exports or attract investments (Aitken & Campelo, 2011). Tourism destinations, on the other hand, have their singularities and demands a specific approach.

The destination is considered a crucial unit of analysis in Tourism studies (WTO, 2016) and can be understood as the "physical space in which a visitor spends at least one overnight. It includes tourism products such as support services and attractions, and tourism resources within one day's return travel time. It has physical and administrative boundaries defining its management, images and perceptions defining its market competitiveness. Local tourism destinations incorporate various stakeholders often including a host community and can nest and network to form larger destinations" (WTO, 2016).

A very important aspect of the tourism destination is the co-existence of many different stakeholders who are all crucial for tourism development, such as local people, visitors, companies, investors and government. This fact brings a lot of challenges to managers, who are obliged to understand not only the consumer, but also community's and the companies' expectations and fears regarding the tourism activity. As Thomas, Shaw and Page (2011) properly argue, a destination is an *amalgam* of different people and businesses with diverse interests. In this context, Destination Management/Marketing Organizations – DMOs – perform a very important role in coordinating all those diverse interests.

A DMO incorporates authorities, stakeholders and professionals, incentivising partnerships on the way to a collective destination vision (WTO, 2016). Recently, there has been a preference for calling them *destination management organizations*, instead of *marketing organizations*. However, Pike and Page (2014) argue that is not appropriate since the term management suggests control, which is not real as very few DMOs have authority and resources to do that. Therefore, it would be more proper to call them Marketing organizations. Among the roles of DMOs are destination strategic planning, product development, promotion and marketing (WTO, 2016). Thus, they are crucial to destination branding process and to do that they face particular challenges as small budgets, global competition, little control, external and internal political pressures and different stakeholders to deal with (Morgan & Pritchard, 2002).

Another and strong challenge for destination branding is the complexity of consumer behaviour (Cai, 2002; Tasci & Kozak, 2006). Currently, consumers receive lots of information from a variety of brands, being exposed to many marketing practices (Usakli & Baloglu, 2011). Because of that, a successful destination needs more than being recognized by potential tourists, it ought to be unique and differential, otherwise, it will not result in a choice by the consumer (Qu, Kim, & Im, 2011).

Many destinations base their brands on physical attributes (Usakli & Baloglu, 2011, Ekinci et al., 2007), however, they are ineffective at differentiating a brand once functional attributes can be easily replaced by other destination. An alternative is positioning brands based on brand personality (Usakli & Baloglu, 2011), which is "the set of human characteristics associated with a brand" (Aaker, 1997, p.347). It assumes that the more the consumer identify his personality traits with brand personality ones, the greater the preference for the brand. (Aaker, 1997). This assumption is named self-congruence and it can also be applied to tourism destinations (Usakli & Baloglu, 2011; Hosany, Ekinci, & Uysal, 2006). Moreover, tourists who identify themselves with the destination, are more likely to return and to recommend it (Usakli & Baloglu, 2011).

The meaning of the expression *destination branding* is many times confused with destination image as they are commonly used together, almost as synonyms (Tasci & Kosak, 2006; Cai, 2002), but beyond them underlies different ideas that some authors have tried to elucidate.

The image of a destination corresponds to the "perceptions about the place as reflected by the associations held in tourist memory" (Cai, 2002, p. 723). It is an essential part of a powerful brand (Hosany et al., 2006), but it is not the brand itself. The brand identifies, differentiate and make a promise to consumers (Blain et al., 2005). Destination image, in its turn, is an attitudinal concept consisting of the sum of a tourist's beliefs, ideas and impressions about a destination (Crompton, 1979 cit. Hosany et al., 2006).

The relationship between destination brand identity and image is reciprocal: "consumers build a destination image in their minds based on the brand identity projected by the marketers. Then, destination marketers establish and enhance brand identity based on their knowledge about consumer's brand image on the particular destination" (Qu, Kim, & Im, 2011, p. 466). Throughout this process, consumer's choices and evaluations are influenced by three types of brand associations: attributes, benefits and attitudes (Keller, 1993; Qu, Kim & Im, 2011). Attributes characterize a brand, they are what the consumer thinks the brand is; benefits are the symbolic or functional values consumers associate with the brand; and attitudes are their evaluations of the brand (Keller, 1993; Qu, Kim, & Im, 2011).

Destination branding is about selecting a consistent brand element mix to build a positive image that identifies and differentiates the destination (Cai, 2002). As brands in general, destination brands perform two important functions: identification and differentiation (Tasci & Kozac, 2006).

The brand identity is the vision for how the destination should be perceived in the market and includes components as values, key competitors, positioning statement, key attributes and benefits, and target audience. And branding helps to build this identity, once it results from all brand elements, providing meaning and strategic vision for the brand (Tasci & Kozak, 2006).

Therefore destination branding can be defined as "the set of marketing activities that (1) support the creation of a name, symbol, logo, word mark or other graphic that readily identifies and differentiates a destination; that (2) consistently convey the expectation of a memorable travel experience that is uniquely associated with the destination; that (3) serve to consolidate and reinforce the emotional connection between the visitor and the destination; and that (4) reduce consumer search costs and perceived risk" (Blain, Levy, & Ritchie, 2005, p. 337).

METHOD

This study carried out a bibliometric analysis, which is the application of statistical and quantitative analysis to publications, whether they are books or other media of communication (Pritchard, 1969). When it deals with scientific publications, it is a very useful tool to understand the state of the art of a field of study and the performance of the research.

One of the most used bibliometric parameters is co-citation, i.e., is the frequency in which two documents are cited together by other publications (Small, 1973). This analysis contributes to understanding the connectivity of a field of study, mapping association, links, collaboration and dialogue among documents, researchers and institutions (Gracio, 2016).

In this paper, it is performed downstream and upstream (Ferreira, Fernandes, Peres-Ortiz, & Alves, 2017). In the first case, we analysed the references cited together by the articles of our sample and built an interlink network. In the second one, we analysed the co-citations of these group of articles made by other publications (Ferreira, Fernandes, Peres-Ortiz, & Alves, 2017).

Data were collected in April of 2019 from Science Citation Index Expanded (SCI-Expanded), Social Science Citation Index (SSCI) and Arts & Humanities Citation Index (A&HCI), compiled the Thomson Reuters, which is available on the ISI Web of Science online database. There were used the following search terms: "destination* brand*" OR "brand* of destination*" in order to achieve expressions such as *destinations' brand*, *destination branding*, *branding of destinations*, and such variations.

The searching process returned 344 results, but 72 of them were, in fact, classified as proceedings paper, reviews, editorial material and book reviews, so they were excluded from the sample. The final sample resulted in 272 scientific articles, with publications from 2001 to December of 2018.

Quantitative and descriptive analyses were carried out using software IBM SPSS version 25.0 (IBM Corporation, New York, USA), and network maps and clusters were built in VOSviewer version 1.6.11, which builds bibliometric maps combing VOS mapping technique with an effective visual component (Van Eck & Waltman 2009, 2010).

RESULTS

Chronological Evolution

Destination branding is an emerging field of research, as can be seen in Figure 1, which displays the number of publications by year. The average year of publication is 2015,0 $\pm$ 2,9, which confirms this trend. Before 2001, no article was published on this theme and from that year to 2007, only 6 articles appeared. However, since 2008, there has been a consistently growing of studies about destination branding.

With the objective to better understand this trend, Figure 2 compares the percentage of the destination branding articles published from 2001 to 2018 with the percentage of the general, Tourism and Marketing articles published in the same databases, main areas connected with destination branding studies.

Figure 1. Number of articles by year of publication

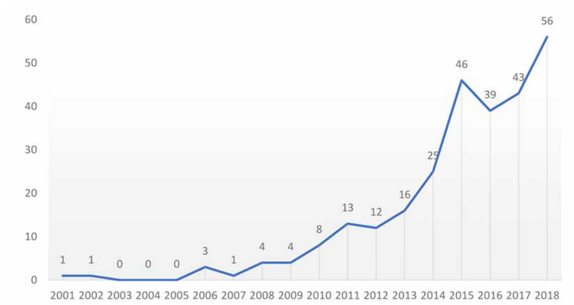
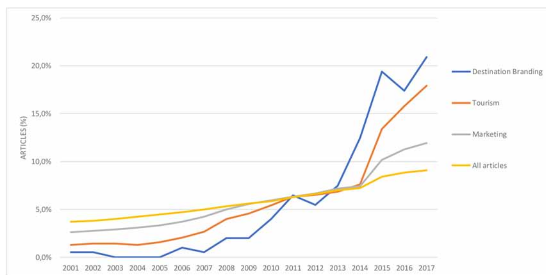


Figure 2. Relative number of articles by year of publication in comparison with other fields of interest



Although the four groups of articles present an increasing trend, branding destination has a sharper line, which confirms it as an emerging field of research.

Citations

The 272 articles of the sample have been cited 3899 times resulting in an average citation per item of 14,30 ±37,5, that indicates a great disparity in the number of citations among records, as we can see in Table 1.

If we compare the year of publication with the number of citations per article, it is possible to see – as one would expect – that older articles tend to have more citations than the new ones. Among the 58

Table 1. Number of citations (ranges)

Number of citations	Number of articles	Percentage
Never cited	58	21,3%
1 to 9	137	50,4%
10 to 19	17	6,3%
20 to 29	22	8,1%
more than 30	38	14,0%
Total	**272**	**100,0%**

never cited articles, 53 were published after 2015; on the other hand, 18 of the articles cited more than 20 times were published after 2014.

Table 13.2 sets the 30 articles on destination branding with the greatest number of citations. Among them, there are five articles with more than 100 citations, which are also the five most cited articles from this sample:

1. Cai, L. P. A. (2002). Cooperative branding for rural destinations. *Annals of Tourism Research*, 29(3), 720–742. (307 citations)
2. Hosany, S., Ekinci, Y., & Uysal, M. (2006). Destination image and destination personality: An application of branding theories to tourism places. *Journal of Business Research*, *59*(5), 638–642. (227 citations)
3. Pritchard, A., & Morgan, N. J. (2001). Culture, identity and tourism representation: marketing Cymru or Wales? *Tourism Management*, *22*(2), 167–179. (192 citations)
4. Qu, H., Kim, L. H., & Im, H. H. (2011). A model of destination branding: Integrating the concepts of the branding and destination image. *Tourism Management*, *32*(3), 465–476. (130 citations)
5. Usakli, A., & Baloglu, S. (2011). Brand personality of tourist destinations: An application of self-congruity theory. *Tourism Management*, *32*(1), 114–127. (104 citations)

In the most cited article, Cai (2002) proposes a conceptual model where destination branding is considered a recursive process around a central axis composed by *brand element mix*, *brand identity* and *brand image building*. With the goal to illustrate this model, Cai applies it to a case study of cooperative branding in rural communities. According to his findings, cooperative branding across multiple communities strengthens destination branding identity and build more favourable, affective and attitudes-based brand, even though affective and attitudes components perceived by the tourists are inconsistent between communities' members and the region.

Hosany, Ekinci and Uysal (2006) argue that, although destination image is widely investigated by scholars, brand personality applied to tourism is a new research theme. Consequently, they provide an investigation on the relationship between destination image and destination personality through the application of branding theories to tourism destination. With the objective of measuring and relate affective image, cognitive image and destination personality, a study was carried out with 148 British nationals who were asked to recall their experiences about visited tourism destinations outside the UK. Findings revealed that most of the destination personality dimensions' variance is capture by emotional components of destination image, therefore, it is possible to affirm that both concepts are related. Another important contribution of this study is the fact that it supports Aaker's (1997) brand personality scale to places and destinations, however, it is not enough to explain the personality traits of destinations.

According to Pritchard and Morgan (2001), the identity of a place is built upon historical, social, economic and political processes. Therefore, in this study, they examine the marketing campaigns of the Wales Tourist Board and Welsh local authorities and discuss the relationship between discourse, tourism representations and destination marketing. It demonstrates that the differences between the way Wales is branded overseas and in UK markets come from the influences of historical, political and cultural discourses in tourism representations used in branding strategies.

Qu, Kim, & Im (2011), in turn, develop and test a theoretical model of destination branding, integrating the concepts of destination image and branding. The authors argue that the unique image of a destination is an important brand association, which has an enormous power to differentiate it from competitors.

Thus, the study verifies the relationships among brand associations, brand image and tourists' future behaviours, through an empirical test conducted with Oklahoma (USA) domestic visitors. The results confirm the influence of the destination image on tourists' future behaviour, especially on intentions to revisit and recommend to others. They also show that the cognitive image is the most influential brand association on the overall image, although uniqueness is also significant, followed by affective image.

Usakli and Baloglu (2011) focus on the brand personality of tourist destinations, investigating the perceived destination personality of Las Vegas and the relationships among destination personality, self-congruity and tourists' behavioural intentions. Based on 368 self-administered questionnaires answered by visitors to Las Vegas, the study's findings indicate that the perceived destination personality of Las Vegas has five dimensions which positively influence tourists' intentions to return and to recommend: vibrancy, sophistication, competence, contemporary, and sincerity. The results also reinforce that tourists attribute personality characteristics to tourism destinations and that it has a positive indirect effect on intention to return and to recommend, which supports the self-congruity theory. Thus, the study concludes that self-congruity is a partial mediator on the relationship between destination personality and tourist's behavioral intentions. At last, it is important to notice that, as Hosany, Ekinci and Uysal (2006), this study also works with Aaker's (1997) personality dimensions, which can be applied to destinations but do not represent all personality traits associated with them, as Hosany, Ekinci and Uysal have once argued.

Journals

The 272 articles of the sample were published in a total of 101 different journals, 76 of them with at least one citation in the field of destination branding. Table 3 presents the most cited journals and specifies respective number of articles and citations.

Concerning journal's subject categories, the absolute majority of the articles were published in sources classified by Web of Science as *Hospitality, Leisure, Sport and Tourism* studies, with 211 records (77,2%) of the sample. It is followed by Management (64 records, 23,5%), Business (37 records, 13,6%), Environmental Studies (21 records, 7,7%) and Sociology (14 records, 5,1%). The rest of the articles are published in 25 categories, such as *Economics* (9 records), Geography (6 records), Communication (6 records) and others.

Authorship, Countries and Affiliation

The 272 articles of the sample were written by 561 authors. Table 13.4 sets the ones with 3 or more articles on the field of destination branding and their respective number of citations. Standing out the most cited are Pike (247 citations), Im (241 citations), Qu (197 citations), Baloglu (130 citations) and Bianchi (112 citations). Concerning the number of articles, the top of the list is Pike (5), followed by Gomez, Molina and Kim (5 each one).

The authors of the sample are affiliated to 98 institutions from 59 countries. Analysing the 5 countries with more articles, we can notice a strong presence of Anglo-Saxon researchers, once there are 50 records from the United States, 23 from Australia and 23 from England. Spain – a traditional country of tourism studies – has 28 records and China, in its turn, 17.

Figure 3 shows the network of co-authorship in terms of countries and their respective clusters. It identifies 11 countries with at least 5 documents and 20 citations. Cluster 1 covers Portugal, Spain and Taiwan; Cluster 2, Australia, Denmark, England and Greece; cluster 3 stands for the United States,

Table 2. Articles most cited in the field of destination branding

	Authors, year	Title	Cita-tions
1	Cai, 2002	Cooperative branding for rural destinations	307
2	Hosany et al., 2006	Destination image and destination personality: An application of branding theories to tourism places	228
3	Qu et al., 2011	A model of destination branding: Integrating the concepts of the branding and destination image	193
4	Pritchard & Morgan, 2001	Culture, identity and tourism representation: marketing Cymru or Wales?	130
5	Usakli & Baloglu, 2011	Brand personality of tourist destinations: An application of self-congruity theory	104
6	Pike & Page, 2014	Destination Marketing Organizations and destination marketing: A narrative analysis of the literature	93
7	Chen & Phou, 2013	A closer look at destination: Image, personality, relationship and loyalty	88
8	Marzano & Scott, 2009	Power in destination branding	71
9	Hudson & Ritchie, 2009	Branding a Memorable Destination Experience. The Case of 'Brand Canada'	65
10	Pike, Bianchi, Kerr, & Patti, 2010	Consumer-based brand equity for Australia as a long-haul tourism destination in an emerging market	64
11	Tasci, Gartner, & Cavusgil, 2007	Measurement of destination brand bias using a quasi-experimental design	61
12	Veasna, Wu, & Huang, 2013	The impact of destination source credibility on destination satisfaction: The mediating effects of destination attachment and destination image	52
13	Garcia, Gomez, & Molina, 2012	A destination-branding model: An empirical analysis based on stakeholders	51
14	McCartney, Butler, & Bennett, 2008	A Strategic Use of the Communication Mix in the Destination Image-Formation Process	48
15	G. Lee, Cai, & O'Leary, 2006	WWW.Branding.States.US: An analysis of brand-building elements in the US state tourism websites	48
16	Ekinci, Sirakaya-Turk, & Preciado, 2013	Symbolic consumption of tourism destination brands	42
17	Gartner & Konecnik Ruzzier, 2011	Tourism Destination Brand Equity Dimensions: Renewal versus Repeat Market	39
18	I. Lee & Arcodia, 2011	The Role of Regional Food Festivals for Destination Branding	38
19	Campelo, Aitken, Thyne, & Gnoth, 2014	Sense of Place: The Importance for Destination Branding	37
20	O'Connor, Flanagan, & Gilbert, 2008	The Integration of Film-induced Tourism and Destination Branding in Yorkshire, UK	36
21	Pike, 2010	Destination branding case study: tracking brand equity for an emerging destination between 2003 and 2007	31
22	Im, Kim, Elliot, & Han, 2012	Conceptualizing destination brand equity dimensions from a consumer-based brand equity perspective	28
23	Kneesel et al, 2010	Gaming Destination Images: Implications for Branding	26
24	Bianchi, Pike, & Lings, 2014	Investigating attitudes towards three South American destinations in an emerging long haul market using a model of consumer-based brand equity (CBBE)	25
25	Gursoy, Chen, & Chi, 2014	Theoretical examination of destination loyalty formation	24
26	Tanguay, Rajaonson, & Therrien, 2013	Sustainable tourism indicators: selection criteria for policy implementation and scientific recognition	24
27	Ren & Blichfeldt, 2011	One Clear Image? Challenging Simplicity in Place Branding	24
28	Boksberge et al, 2011	Self-Congruity Theory: To What Extent Does It Hold in Tourism?	23
29	Barnes, Mattsson, & Sorensen, 2014	Destination brand experience and visitor behavior: Testing a scale in the tourism context	22
30	De Moya & Jain, 2013	When tourists are your "friends": Exploring the brand personality of Mexico and Brazil on Facebook	22

Canada, China and South Korea. It is noteworthy highlighting the localization of the United States in the centre of this network map, connected with the largest number of countries.

Considering the continents underlying those studies, we should report that 65,7% of the studies have at least one author affiliated with a European institution; 30% with Asia, 27,6% with North America, and only 3,3% and 2,3% of the articles were written by authors affiliated with Africa and South America, respectively.

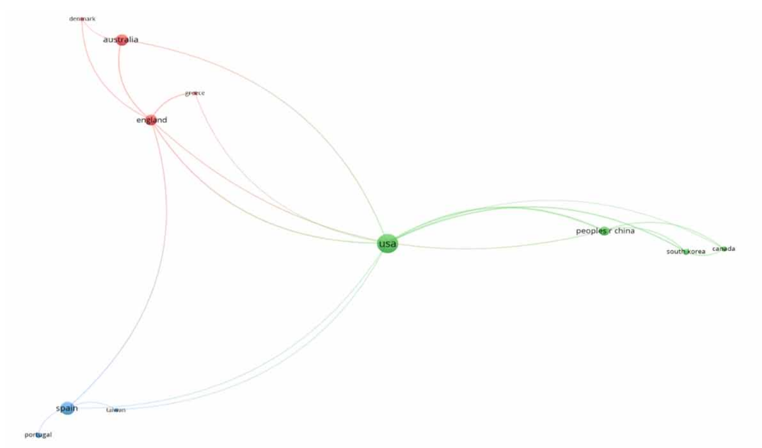
Table 3. Journals with the largest number of articles on the field of social entrepreneurship

Journal	Number of articles	Total citations	Average citations per article
Journal of Destination Marketing & Management	31	212	6,8
Journal of Travel & Tourism Marketing	21	263	12,5
Tourism Management	18	1256	69,8
International Journal of Tourism Research	14	291	20,8
Journal of Travel Research	9	297	33,0
International Journal of Culture Tourism and Hospitality Research	8	28	3,5
Journal of Vacation Marketing	8	108	13,5
Asia Pacific Journal of Tourism Research	7	26	3,7
Anatolia-International Journal of Tourism and Hospitality Research	6	12	2,0
Journal of Business Research	6	427	71,2
Place Branding and Public Diplomacy	6	10	1,7
Scandinavian Journal of Hospitality and Tourism	6	53	8,8
Tourism Analysis	6	15	2,5

Table 4. Authors with largest number of articles in the field of destination branding

Author	Documents	Total citations	Average citations by article
Pike, S	7	247	35,29
Gomez, M	5	92	18,40
Molina, A	5	92	18,40
Kim, S	5	42	8,40
Im, Hh	4	241	60,25
Bianchi, C	4	112	28,00
Tasci, Ada	4	63	15,75
Huertas, A	4	9	2,25
Qu, H	3	197	65,67
Baloglu, S	3	130	43,33
Hudson, S	3	69	23,00
Kladou, S	3	23	7,67
Avraham, E	3	21	7,00
Ketter, E	3	21	7,00
Fernandez-Cavia, J	3	14	4,67
Bjork, P	3	12	4,00

Figure 3. Network of co-authorship in terms of institutions' countries



Co-Citation Networks

In order to perform a co-citation analysis, the initial sample of 210 articles was reduced to those 39 articles with at least 20 citations by a total of 1175 publications. The final set was then reduced to the 36 documents since three of them did not present a relevant total link strength (we selected the articles with at least two linkages and a minimum strength of 2 units. As a result of co-citation analysis, the co-citation network of the 36 articles and its four clusters (Figure 13.4). The size of the circles represents the number of citations. Table 13.5 details the main findings and the central topics of each cluster.

Cluster 1 stands for studies that contribute to understanding the connections between destination branding and destination image and personality. They have different objectives and objects – some explore communication tools, others focus on consumer behaviour – but they all bring insights about how destination branding affects destination image and, in some cases, consumer choices and loyalty. Cluster 2 identifies studies that describe and analyse practices and cases of brand building. Cluster 3 regards studies on consumer-based brand equity and, finally, cluster 4 is composed of studies that discuss branding strategies and communication.

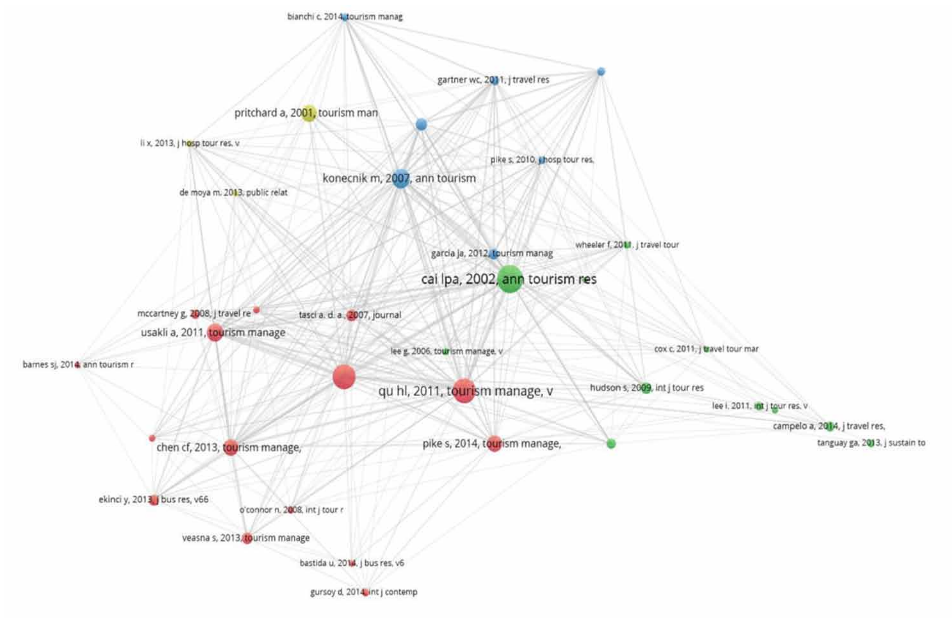
Interlink Network

In order to understand the theoretical basis of the destination branding studies, we examined the 8909 references cited by the 272 articles of the sample. We also undertook a cluster analysis of the 32 ones cited at least 20 times and built the respective interlink network, showing the connections among references according to times they are cited together (Figure 13.5).

Among the 32 most cited references, there are 26 articles, one review (Pike, 2009) and 5 books: *Managing brand equity* (Aaker, 1991) with 53 citations; *Building strong brands* (Aaker, 1996) with 40 citations; *Strategic brand management* (Keller, 2003); *Multivariate data analysis* (Hair, 2010) and *Destination branding* (Morgan, Pritchard & Pride, 2002), both with 21 citations.

The five top articles in the number of citations are Blain, Lecy & Ritchei (2005) with 70 citations; Cai (2002) with 63; Keller (1993), 62; Konecnik & Gartner (2007), 53; and Baloglu (1999) with 45 citations.

Figure 4. Network of co-citations and respective clusters



It is noteworthy to mention that only 8 articles of those 26 most cited are part of the initial sample of this study. The other 18 do not match the criteria used to collect data for different reasons. Morgan et al. (2003), Murphy, Moscardo & Benckendorff (2007), Pike (2005), Tasci & Kozak (2006) and Blain, Levy & Ritchie (2005) approaches destination branding directly, however the journals where they were published are not included on the ISI Web of Science databases. Aaker (1996) and Keller (1993) approaches brand-equity in general products. Baloglu & McCleary (1999), Buhalis (2000), Crompton (1979), Gallarza et al (2002) and Gartner (1993) focus on destination image and destination marketing in general. Hankinson (2004) is based on the place brand concept. Yoon & Uysal (2005) and Zeithaml (1988) are about consumer behaviour. Boo et al. (2009) and Konecnik & Gartner (2007) discuss customer brand equity applied to destinations, however, they do not employ the search terms as used in this research.

Concerning the authors cited by these 272 articles, we find 5818 authors. Standing out among the most cited ones are Stephen Pike (230 citations), David Aaker (157), Keller (153) Morgan (140) and Baloglu (120). Figure 6 sets the network for the 66 authors cited at least 20 times and its respective clusters.

As regards the 3728 sources cited by the initial sample, Tourism Management is the most cited journal, with 1126 citations; Annals of Tourism Research has 681 citations; Journal of Travel Research, 615 36 of them have received at least 50 citations. The co-citation analysis of the most cited journals (at least 50 times) revealed two clusters: one standing mainly for tourism publications, the other for marketing studies, as can be seen in Figure 13.6.

FINDINGS AND CONCLUSION

This study attempted to characterize the intellectual structure of the scientific publications about destination branding, to identify its authors' location in terms of institution and countries and to recognize is research's lines.

Table 5. Resulting clusters from the co-citation analysis performed on the 36 most cited articles

	Article	Findings / Highlights
Cluster 1: Destination image and personality	Barnes et al., 2014	This paper approaches destination branding via a model and scale: destination brand experience (DBE). Results show that DBE is a significant determinant of visitor outcomes (satisfaction, intention to revisit and intention to recommend). But satisfaction has a strong mediating role between DBE and outcomes.
	Bastida & Huan, 2014	It compares and analyses quality and usefulness of tourism websites of four global destination brands: Hong Kong, Shanghai, Beijing and Taipei.
	Boksberger et al., 2011	Self-congruity theory application to tourism depends on how it is measured. In a large scale study of Swiss travellers, more than half of the trips were classified as self-congruity.
	Chen & Phou, 2013	Destination image and personality have positive effects on the tourist destination relationship and on behaviour of tourists, who form emotional relationships with destinations.
	Ekinci et al., 2013	The symbolic meaning of tourism destination brands. Destination brand loyalty is affected by three dimensions: self-congruence, brand identification and lifestyle-congruence.
	Gursoy et al., 2014	Previous experiences, place attachment and involvement, in this order, are the most influential factors of destination loyalty formation. Destination image has direct and indirect effects on perception of service quality and satisfaction, which directly impact destination loyalty.
	Hosany et al., 2006	Destination image and destination personality are related concepts, since the emotional component of destination image captures the majority of variance on destination personality dimensions.
	Kneesel et al., 2010	It investigates brand images and perceptions of Las Vegas, Atlantic City, Chicagoland and Connecticut. Results suggest difficulties in applying brand personality scales to tourist destinations, since no brand personality descriptor was quoted. Well-known destination brands were associated with high awareness and familiarity, positive overall images and affective descriptions.
	McCartney et al., 2008	A communication mix strategy could be designed to more effectively manage tourist destination image perceptions. The study presents a “Communication Effectiveness Grid” (CEG) with quadrants indicating marketing resource effectiveness.
	O’Connor et al., 2008	This paper identifies the integration of film induced tourism and destination branding on destinations.
	Pike & Page, 2014	This article makes at narrative analysis of the areas of research that have developed within the destination marketing field.
	Qu et al., 2011	The results confirmed that overall image is influenced by three types of brand associations and is a critical mediator between brand associations and tourists’ future behaviour. In addition, unique image had the second largest impact on the overall image formation, following the cognitive evaluations.
	Tasci et al., 2007	A quasi-experimental design was applied on three groups of students, using a promotional movie as the stimulant, representing the destination brand, Turkey, known to have a rather distorted image. This methodology revealed itself to be effective in measuring the negative bias in the images of tourism destination brands.
	Usakli & Baloglu, 2011	Self-congruity is a partial mediator on the relationship between destination personality and tourist’s behavioural intentions.
	Veasna et al., 2013	Building emotional destination attachment is a key to destination branding. Destination image affects tourist perceptions of destination satisfaction with regard to destination attachment.
Cluster 2: Brand building cases and practices	Cai, 2002	It proposes a conceptual model of destination branding founded on the spreading activation theory and extended from the image formation process framework.
	Campelo et al., 2014	In order to develop an effective destination brand, the appreciation of the sense of place and its people should be the centre of the branding strategy.
	Cox & Wray, 2011	Based on best practices from 21 regional destinations of Australia, it develops a framework with nine best practices principles and an integrative approach to destination marketing.
	Hudson & Ritchie, 2009	Destination brand should communicate the promise of a memorable travel experience and not only its physical attributes. The study presents a four-step conceptual model for branding a destination.
	G. Lee et al., 2006	The most used type of slogan used in US states tourism websites is *buy us because we are good*; common attribute-based. Almost all the states emphasize nature and culture/heritage, and many of them present consistency’s lack among the website elements.
	I. Lee & Arcodia, 2011	Food festivals may play a very important role on destination branding process, improving its positive image.
	Marzano & Scott, 2009	Although destination branding is collaborative process, it can be positive even though there is no unity and collaboration among its stakeholders, especially when they defend their interests with persuasion and authority.
	Ren & Blichfeldt, 2011	Different stakeholders have different images of the same destination. While it is now argued that brands should be simple and based on a single identity, in the case of tourism destinations, diversity brands can create more refine differentials based on a complex understanding of the destination identity and image.
	Ryan & Silvanto, 2014	The degree of democracy in a society has an important role in encouraging the promotion of World Heritage Sites as tourism destinations.
	Tanguay et al., 2013	Through a case study of a region in Quebec, Canada, this study discusses the use of sustainable tourism indicators as a way to balance academic and policy-maker approaches in planning and managing a destination.
	Wheeler, Frost, & Weiler, 2011	It presents a qualitative case study of a regional tourist area in Australia, showing how sustainable brands are developed organically and driven by the communities’ values, rather than by a limited consumer-based value set imposed upon a destination.

continued on following page

Table 5. Continued

	Article	Findings / Highlights
Cluster 3: Consumer based brand equity	Bianchi et al., 2014	A model of consumer-based brand equity was applied to three South American countries, in order to examine travellers' perceptions of these destinations. Results show that the model is adequate to explore consumers' attitudes regarding long-haul trips.
	Garcia et al., 2012	The study develop a destination-branding model based on stakeholders' interests: Success Index of Triple-Diamonds (SITD). Results show that a successful branding strategy should focus not only on visitors (traditional approach) but also on local people and entrepreneurs.
	Gartner & Konecnik Ruzzier, 2011	Image and quality are the most important dimensions in tourist's evaluation of a tourism destination. The dimensions of awareness and loyalty have differences in importance for first time and repeated visitors.
	Im et al., 2012	It presents a conceptual framework for destination brand equity that goes beyond image by adapting and expanding a multidimensional consumer-based brand equity scale. Results confirm the importance of brand image, associations and awareness and highlights the mediating role of brand loyalty in building destination brand equity.
	Konecnik & Ruzzier, 2008	It applies a structural equation modelling technique to verify conceptual model of customer's evaluation of a tourism destination brand. Results show that image is the strongest dimension of the model, although the other ones are also important (tourism destination awareness, perceived quality and loyalty).
	Pike, 2010	It applies Customer-Based Brand Equity - CBBE model to tourism destination and concludes that CBBE hierarchy is a practical tool for evaluating destination brand performance over time.
	Pike et al., 2010	A standard CBBE instrument can provide long-term effectiveness performance measures even when there changes in destination marketing organisation staff, advertising agency, other stakeholders and budget.
Cluster 4: Communication	De Moya & Jain, 2013	It shows how Mexico and Brazil communicate their brand personality through Facebook, and which personality traits their followers associate with them. Results indicates that both countries emphasize distinct brand personality traits. But Mexico was more successful than in transferring projected brand personality to its followers.
	Li & Kaplanidou, 2013	Based on Beijing Olympic Games' case, this study shows that American travellers' collective perception of China as a destination did not change after the Games, but subgroups of this population showed different levels of susceptibility to perception change. The findings demonstrate the challenge of changing a destination's brand perception.
	Pritchard & Morgan, 2001	The tourism representations used in contemporary branding strategies are influenced by historical, political and cultural contexts.

Chronological evolution of destination branding studies confirms it as a new field of study that started especially at the end of the 1990s (Pike and Page, 2014; Cae, 2002, Hosany, Ekinci, & Uysal, 2006) and got strong on the last decade.

The number of citations suggests that, despite this growing number of studies, few of them are until this moment being considered by other researchers, which is expected given they were recently published.

The most cited journals' results suggest that destination branding is mainly on the spot of Hospitality and Tourism researchers. On the other hand, among the most cited sources highlights authors and journal of marketing and management studies as bases for tourism destination researches.

Authorship analysis shows a strong presence of Europe on this domain, but, when countries are considering separately, we observe a predominance of Anglo-Saxon countries – with an emphasis in the United States, Australia and England – Spain and China.

The network of co-authorship in terms of countries suggests that linkages come not only from language or localization but also from established partnerships among institutions and authors. Future researches could explore it in depth. The United States occupy a central place in this map, which together with the largest number of articles indicates its strength in destination branding studies.

From the network analysis of co-citations emerged four clusters of articles which indicates main areas of research and, possibly trends: linkages between destination brand and image, case studies of destination branding process, consumer-based brand equity and the effects of communication tools and resources on branding.

This research presents some limitations that would be overcome in the future. First one regards the database used for this investigation. Although Web of Science has the highest scored journals, some of the most cited articles by our sample come from journals out of it. It suggests that other databases could

Figure 5. Reference network cited by the 272 articles

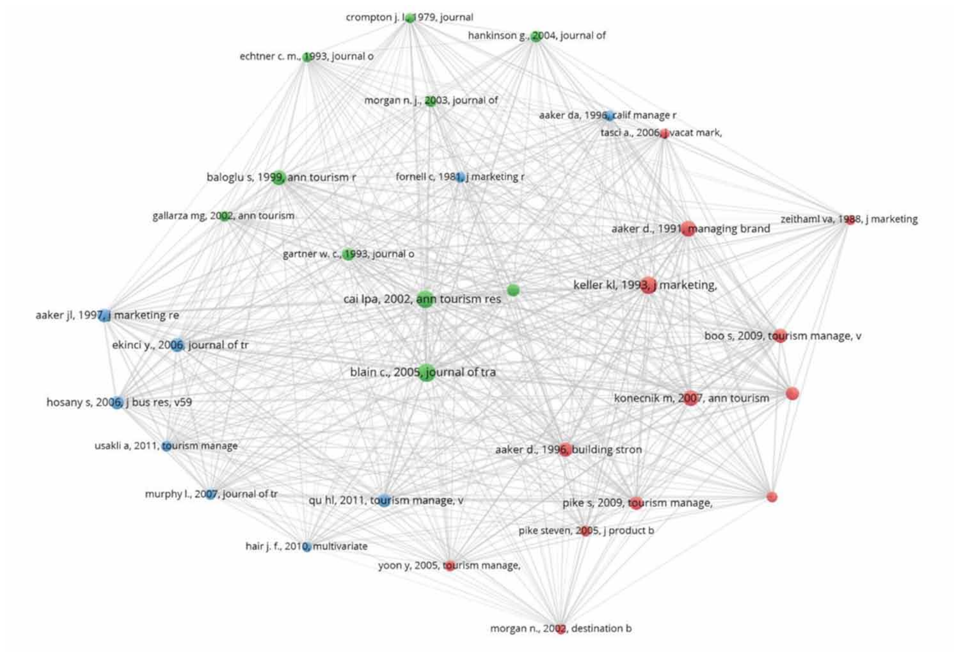
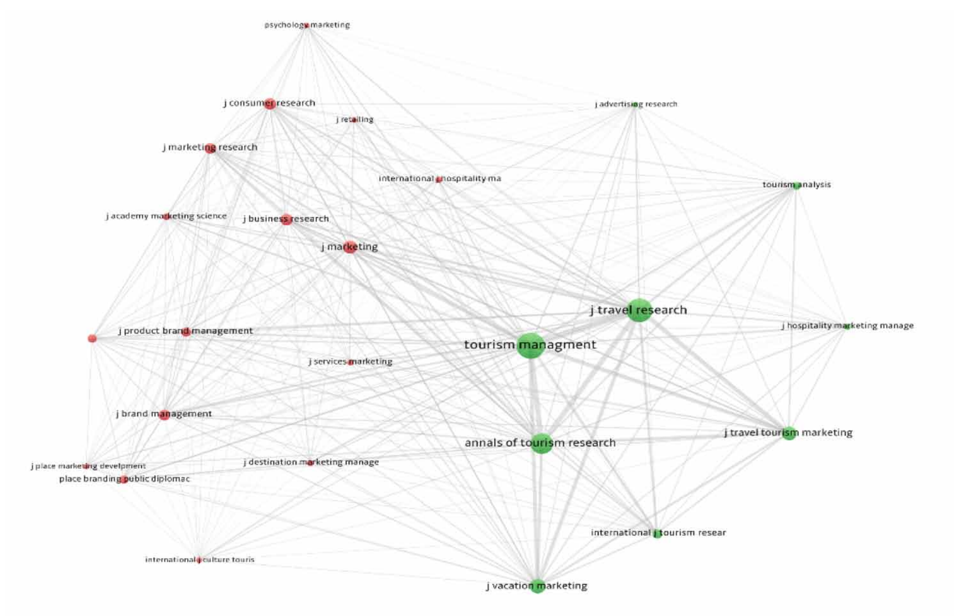


Figure 6. Network of most co-cited sources in the 272 initial articles and respective clusters



be added in new studies. Another one concerns the need for a deeper understanding of the most cited studies, which implies a qualitative analysis of literature. It is also important to analyse the methods used on those researchers. Nevertheless, this paper has contributed to the understanding of the framework of destination branding as a field of study and we expect that gaps and limitations named above open paths to new investigations.

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Chapter 14
Achieving a Competitive Management in Micro and Small Independent Hotels

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ABSTRACT

The lodging industry is a crucial contributor to global tourism revenues in many countries. A significant part of hotel revenues comes from micro and small hotel companies not belonging to global brands. The aim of this chapter is to propose new tools – based on USALI and on the most relevant operating ratios – to support the management of micro and small hotels that are not integrated into hotel chains. The methodology starts with literature review, which allowed to point out some USALI schedules that are not being used, a lot of items of USALI schedules without relevance and a set of operating ratios and indicators highlighted by researchers and professionals. The first result consists in the proposal of seven simplified hospitality management accounting schedules (revenue and cost items). The second result is an operating scorecard that includes the ratios and indicators useful for micro and small independent hotels.

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INTRODUCTION

Hotels incorporated in hotel chains benefit of a multi-level management support structure. This is not the case of independent hotels acting alone but competing at the same level, that is, on a global scale.

In many countries, the hospitality industry is mostly composed by micro, small and medium-sized companies. Given this reality, it is crucial to provide these hotels with management tools for support decision-making in order to increase their competitiveness.

In this way the two main objectives of this chapter were established:

- To propose an adapted management accounting system, based on USALI (Uniform System of Accounts for the Lodging Industry), to apply on micro and small-sized hotels, which does not need to contain all schedules and items of the original USALI (a simplified version);
- To propose an operating scorecard that includes the most important operating indicators to support decision-making and to allow comparability as well.

To achieve these objectives, the background of the research is supported in literature review, which allows the authors to proceed to the USALI theoretical framework and to figure out the key operating ratios and indicators. In both cases, before proceeding with the proposals, different opinions and limitations in the use of these tools were considered.

At the end, new lines of research are opened giving continuity to this work. In terms of methodology, it is important to refer that books, scientific articles and research work of the authors were used.

BACKGROUND

SMEs have got a simplified organizational structure, thus the application of change in these organizations is easy (Mitchell and Reid, 2000 cited by Lopez and Hiebl, 2015). Nevertheless, the SMEs exhibit lack of resources and the impossibility of competing with economies of scale (Jarillo, 1989 cited by Lopez and Hiebl, 2015). However, it is known that SMEs are competing in a global world and the same happens with micro and small-sized hotels that are competing with international chain hotels. In order to obtain success, hospitality managers need to optimize the decision-making process for which they use relevant information provided for management accounting (Nunes and Machado, 2014). The utilization of more complex methods by hotels belonging to a chain is referred by Nunes and Machado (2014).

SMEs do not have the opportunity of use the management accounting skills of large companies (Mitchell and Reid, 2000 cited by Lopez and Hiebl, 2015). Several factors influence management accounting systems in SMEs, such as environment, staff and organization factors (Lopez and Hiebl, 2015). Lopez and Hiebl (2015) found out a difference in the use of management accounting comparing larger companies with SMEs. They refer that the performance of SMEs gains if they have got a suitable management accounting. "Adapting management accounting practices that were designed for larger firms to SMEs needs", it was indicated by Lopez and Hiebl (2015) as a future research.

The hotels' flexibility is an important factor given macroeconomic adjustments and customer preferences changes with the emergence of new products. This requires a management taking in consideration changes as a constant. Managers should develop the ability to monitor these changes in order to avoid financial decline. This situation is applied to micro and small-sized hotels, thereby justifying the need of hospitality management accounting adjustment.

In fact, the case of small independent hotels is specific (Melia & Robinson, 2010:2). The findings of this study indicate that small and medium independent hotels need an adapted structure to measure their performance. Thus, it will be necessary to adjust the complexity level of USALI as well as at the usefulness of the operating ratios and indicators. To achieve a competitive management, hoteliers need to apply simplified tools based on USALI and summarized scorecard.

Currently, the Uniform System of Accounts for Lodging Industry (USALI) is the management accounting system mostly used by hotels which belong to an international chain. The discussion starts when it is necessary to adapt USALI information to be used by micro and small-sized independent hotel managers. According to Planas (2004), USALI can only be applied to small hotels that have got a differentiated departmental structure. The use of USALI in small hotels has some advantages, such as: standardization in information processing; use as a benchmarking tool; comparing results among hotels.

At the moment hoteliers have at their disposal an extensive list of ratios and indicators to optimize their complex decision-making process. Melia & Robinson (2010:2) concludes "that there is a need for these hotel operators to adopt a more structured formal approach to performance measurement". In this study a model for this kind of hotels was proposed and, regarding operating ratios, several operating ratios and indicators were suggested: wage percentage, labour cost, food cost, beverage cost, occupancy rate, RevPAR, RevPAS, average room rates, budget variances and waste management measures.

The importance of financial and non-financial ratios and indicators is highlighted by Sainaghi et al. (2013) and reinforced by Chiu & Huang (2011) mainly when the hotel does not belong to a chain. In this sense, operating ratios and indicators provide very useful information for hotels performance evaluation and monitoring operating results. Notwithstanding, it is necessary to reduce ratios and indicators to be used by micro and small-sized independent hotel managers.

In this perspective the next points are going to present the authors position on adapted USALI and on operating ratios and indicators, both to be used by micro and small-sized hotel managers.

THE USALI AS A WAY OF STIMULATING HOTELS' COMPETITIVE MANAGEMENT

Information provided by management accounting is useful for decision making and improve its quality (Santos et al. 2010; Zounta & Bekiaris, 2009; Briciu et al., 2013; Persic et al., 2013). In all types of companies, the balance sheet and the profit and loss statement are used to support management. Regarding hotels, Schmidgall (2011) refers income statement as an important source of information but, he stresses that each hotel is organized by profit centres and service centres.

Therefore, considering the typical nature of the business, hoteliers ask for more internal information than that which is in reports. Trying to get answers, in the hospitality industry there are four uniform systems of accounts where data is processed similarly:

- Uniform System of Accounts for the Lodging Industry (USALI);
- Uniform System of Accounts for Restaurants (USAR);
- Uniform System of Financial Reporting for Clubs (USFRC); and
- Uniform System of Financial Reporting for Spas (USFRS).

Schmidgall & DeFranco (2015a) refer to USALI as a big brother of the other systems.

The USALI appears from the combination of three major publications:

- From the Uniform System of Accounts for Hotels (USAH) first time published in 1926 by the Association of New York City (HANYC);
- From the Uniform System of Accounts for Smaller Hotels; and
- From the Expense Dictionary, where expenditures were categorized under specific accounts (Ni, 2011).

According to the Financial Management Committee (FMC) of the American Hotel & Lodging Association, USALI currently has the following purpose: "operating statements that are formatted to provide hotel owners, managers, and other interested parties with information and data that are pertinent to the unique operating environment of the lodging industry" (HANYC, 2014, p. XII). These standards represent the effort to make one uniform system applicable to hotel operations throughout the world (HANYC, 2014).

According Persic & Jankovic (2010), Ni (2011) and Schmidgall & DeFranco (2015), USALI acts as an accounting guidebook or a handbook, providing a high level of detail of departmental performance reports in which accounts are grouped based on revenues and expenses. Thus, USALI is a system of accounting based on departments (Persic & Jankovic, 2010).

Kosarkoska & Mircheska (2012) and Schmidgall & DeFranco (2015) highlight that USALI is adaptable to all kinds of hotels and provides internal accounting information, allowing the comparability among hotels.

In order to reflect changes in hotelier practices USALI is periodically re-evaluated; the USALI 11th revised edition is the result of numerous changes from the original one and its presentation is organized by operating departments and undistributed operating departments (Schmidgall & DeFranco, 2015a; Persic & Jankovic, 2010) and is divided into five parts: I) Operating Statements; II) Financial Statements; III) Financial Ratios and Operating Metrics; IV) Revenue and Expense Guide; V) Gross vs. Net Reporting (HANYC, 2014):

- Part I has the Operating Statements that were developed for full-service properties. These can be easily adapted to limited-service properties just by taking out those schedules that do not apply to their business.
- Part II is about the basic Financial Statements produced for external users, for example: balance sheet, income and cash flow statements and notes to the financial statements.
- Part III provides useful information to deal with a series of financial ratios and operating metrics.
- Part IV contains the revenue an expense guide.
- Part V examines gross versus net reporting as well as the treatment of surcharges, service changes and gratuities.

In what Operating Statements are concerned, the focus goes to rooms and food departments. Operating Statements were developed for full-service properties, but these can be easily adapted to limited-service properties just by taking out those schedules that do not apply to their business (HANYC, 2014).

According to HANYC (2014) there are two Summary Operating Statements, one for operators and other for owners. However, both statements are identical until the line of earnings before interest, taxes, depreciation and amortization (EBITDA).

All the schedules have included information for the current period and for the year-to-date. In each of these periods there are three columns of information including current, budget and prior year. All revenues and expenses should be shown as monetary unit and as percentage (HANYC, 2014).

USALI states four categories of operating revenues: “rooms”, “food and beverage”, “other operating departments” and “miscellaneous income” with several items (HANYC, 2014).

There are three categories of expenses: departmental expenses, undistributed operating expenses and non-operating expenses:

- Regarding departmental expenses with respect to an operated department revenue (“rooms”, “food and beverage” and “other operating departments”) each operated department has departmental expenses separated in four groups: “cost of sales”, “cost of other revenue”, “labor cost and related expenses” and “other expenses”, with several items.
- Undistributed operating expenses report expenses related to all the hotel which are not allocated to other departments. There are five categories: “administrative and general”, “information and telecommunications systems”, “sales and marketing”, “property operation and maintenance” and “utilities” with several items (HANYC, 2014).

Controversies

Nevertheless, Patiar (2016) criticizes USALI, since it does not provide accurate data. USALI only allocates direct costs. Indirect costs remain in a pool and they are apportioned to the total income. So, this author refers that USALI fails in identifying the exact expense of each department and service.

The last edition of USALI remains based on traditional cost, it does not apply neither activity-based cost nor allocate indirect costs.

According to Georgiev (2016) USALI should be more internationally directed, for the system to be applicable worldwide. USALI does not provide information per guest segments, which is very important for the marketing department.

Who is Using USALI?

Howsoever, USALI is widely used in the country where it was born (United States of America). In Spain, Planas (2004) verified that international chains used USALI more than national chains.

The way USALI is used is not homogeneous, because departments differ across hotels:

- In Greece, Zounta & Bekiaris (2009) refer that there is not any Greek Uniform System of Accounts for hotels. The hotels follow a general system of accounts, but about 70.8% of hoteliers believe that a system of accounts for hotels is a necessity. Pavlatos & Paggios (2007) noticed that only 2.9% of national chains or independent hotels used USALI.
- In Macedonia, the most of hoteliers knows USALI but does not use it. However, they are ready to learn and to implement this uniform system. Macedonian hoteliers developed their own financial

report with similar indicators, allowing only a comparison within their country (Kosarkoska & Mircheska, 2012).

- In Croatia, Persic & Jankovic (2010) show 84% of USALI adoption but there is not any data concerning the percentage of use in independent hotels. USALI has been used for 20 years (Persic et al., 2013). Nevertheless, Croatian hotels only use two departments: "rooms" and "food and beverage".
- In China, the hotel industry does not use USALI - each hotel makes its own record. However, it is an urgent priority to develop a uniform system of accounts for all kinds of hotels. It was referred that through professional networks and industry associations, it will be possible to adopt a uniform system (Yu & Huimin, 2007).
- In Australia, hotels that are part of international chains follow management practices that are independent of their location (Patiar, 2016).
- In Bulgaria few hoteliers know USALI, but they are interested in this new technique (Georgiev, 2016).
- In Portugal, Faria et al. (2012) state 50% of USALI adoption in hotels of 4 and 5 stars in the Algarve region. In the case of independent hotels, the percentage reaches 52.4%. According to Faria et al. (2015), the Portuguese Hotel Association (Associação de Hotéis de Portugal - AHP) made the first inquiry about the use of USALI in Portugal. The authors report that the levels of USALI adoption are reduced, except in the city of Lisbon and in some hotels in Algarve. Regarding the region of Algarve, recent studies show that 50% of the enquired adopt USALI (Faria et al., 2015). Gomes et al. (2015) refer that USALI is not used by most hotels in Portugal. USALI is essentially used for the decision-making process, to prepare budgets and as a source of information of control systems. The hotel managers demonstrated a high degree of satisfaction using USALI to define costs, profitability analysis of products, pricing and profitability analysis of the markets. These authors have also determined the factors that influence the adoption of USALI, such as competitiveness in promotion, size (number of employees) and when the decision-making is carried out at operational level. Correia et al. (2016) have done a research about the items that should be used in independent hotels, but the sample was small and it was the beginning of this research. In Portugal a hospitality management accounting book was developed, where the USALI schedules are shown, but applied to the Portuguese reality (Santos et al., 2016).

USALI or Adapted USALI in Small Hotels

According to Dearden (1963), management accounting techniques should be adapted to small businesses, what it is corroborated by López & Hiebl (2015), when they referred that SMEs use management accounting in a different way.

Considering the size of hotels, Schmidgall & DeFranco (2015) refer that USALI is completely flexible in terms of schedules, sub-schedules and items. In other words, it could be adapted for those small hotels in which some items, sub-schedules and schedules should be reduced, as well as in large hotels, where some necessary items, sub-schedules or schedules could be added.

- Planas (2004) noticed that 63% of Spanish small independent hotels have adopted USALI. In another recent study carried out in Spain applied to independent hotels and to hotels belonging to a chain, Peña et al. (2017), through the application of a questionnaire, reveal that only about 9% of the hotels use the USALI. Despite this low utilization rate, 68% considered that it would be important to have an own chart of accounts for a better analysis of costs and ratios. Another result of the study was that about 77% of managers use the departmental results account (rooms, F & B and others) and 75% use the direct costing system which separates revenue generating departments and those that only have costs (Peña et al., 2017).

- In Brazil, the number of micro hotels that do not use a cost system is huge (Lunkes, 2009).
- Regarding the accounting practices in Portugal, Lima Santos et al. (2012) have noticed that only the big hotels with foreign management adopt USALI. This is in line with the findings of Faria et al. (2015).

According to Planas (2004) and Schmidgall (2011), USALI can be adapted by large and small hotels. Schmidgall (2014) states that USALI intends to meet the hoteliers' needs. In these terms, the main question is "what happens if small hotels remove several items and schedules? Which of them are they not going to use?".

According to Schmidgall & DeFranco (2015a), many owners of small hotels have no idea of how to classify revenues and expenses as well as the reporting of those items.

As mentioned above, this research focuses on the case of Portugal. Hence, the aim of this study is to propose the use of USALI for small independent hoteliers, which will include all the information they require. The decision process of hoteliers is not adequate, with the miscellaneous information available. If USALI allows line items to be removed and if it provides the necessary information to hoteliers, why not create a USALI for small independent hotels? It existed previously and there are not records related to inefficiency in the use of information. Weygandt et al. (2005) refer that from 1930s to 1970s there was the Uniform System of Accounts for Smaller Hotels, when most hotels were smaller.

In a study about homogeneity in the application of USALI in Catalonia – Spain, Campa-Planas & Banchieri (2016) demonstrated the existence of heterogeneity in the hospitality sector. The authors confirm a wide range of criteria in the application of USALI, which leads to the conclusion that standardization for small and medium-sized enterprises would be important.

HOTELS' PERFORMANCE EVALUATION RATIOS AND INDICATORS

The Part III of the USALI 11th edition provides several financial ratios and operating metrics. Schmidgall & DeFranco (2015b) highlight some new metrics (available rooms, sold rooms, occupancy, ADR, Rooms RevPAR and TRevPAR).

Despite the objective of USALI is to provide a uniform list and a definition of ratios and metrics (HANYC, 2014) that is not a complete list, but even so it is the most widespread. Moreover, according to HANYC (2014), ratios and metrics are a way to simplify the huge statement and schedule's data.

There are multidimensional performance evaluation indicators for hotels (Chen, 2009). In this sense, Schmidgall (2011) refers that operating ratios aid hotel managers in evaluating the operating activities of a hotel. With the objective of achieve the efficiency, managers have been using performance indicators (Anderson et al., 1999).

Chin and Barney (1995) indicate some of the indicators that should be used by hotels for a best performance: room or bed occupancy, average room rate, revenue per available room, sales per employee hour worked, average spend per head and seat turnover.

More specifically, the most commonly used ratios in the studies of the operating performance of hotels are occupancy rate, ADR and RevPAR (Tuţă and Micu, 2013; Sainaghi et al., 2013; Hua et al., 2015; Lamelas & Filipe, 2012; O´Neill & Carlback, 2011; Phillips, 1996; Chin & Barney, 1995; Hua et al., 2018). Hua et al. (2018) refer that loyalty program expenses have a significant and a positive impact on occupancy rate, ADR and RevPAR.

In their literature review, Sainaghi et al. (2013) also mentioned the total revenue per available room (TrevPar) and the gross operating profit per available room (GOPPAR). Lado-Sestayo et al. (2017) also refer TRevPAR and they found out that the attributes of the hotel as well as the location influence the TRevPAR. According to Bhamornsathit & Katawandee (2016), occupancy rate, ADR and RevPAR are the most common ratios. Related with costs, the food cost percentage, beverage cost percentage and labour cost percentage are the most used ratios (Miller et al., 2002; Dittmer, 2003).

In their study, Peña et al. (2017), concludes that the least used ratios were Total revenue per available room (TRevPAR) and average length of stay.

The use of ratios is imperative to measure the performance of hotels. Nevertheless, there are some principles that must be assumed: ratios must be carefully chosen; managers have to understand what kind of number originated the ratios; they have to allow corrective actions; they have to be periodically analysed (Schmidgall & DeFranco, 2004).

Controversies

In the opinion of Sainaghi et al. (2013) it is necessary to use financial and operational ratios. Nunes and Machado (2014) corroborated this position, considering the utilization of several indicators for the performance evaluation by the Portuguese hoteliers.

Ribeiro at al. (2019) analysed the indicators in Portuguese hospitality sector and they found out that hoteliers highlight performance indicators and for the decision-making the hoteliers prefer financial and customer-related indicators, considering the indicators divided by the perspectives of balanced scorecard.

In this perspective, Wadongo et al. (2010) have shown, in a study carried out in Kenya, that hotel managers use mostly financial (including operating) indicators, however, they believe that financial information is limited and that other indicators should be used that take into account other aspects of such as resource use innovation, environmental and community indicators.

In the use of the indicators and their analysis it is important to mention that it is necessary to consider the context of the companies for more decisive decision-making. For example, Ponikvar, Tajnikar e Pušnik (2009) have demonstrated that the growth rate of firms influences the results of some financial and non-financial management indicators.

Key Operating Ratios and Indicators in Literature

Literature review was made in order to understand and identify the main operating ratios and indicators, how are their formulas and their different denominations.

To summarize the main operating ratios and indicators, Gomes et al. (2017b) study was followed and completed with other studies. The operating ratios considered as the most useful were divided into three categories: rooms, F&B and all operating departments. All the tables (Table 1 to Table 3) indicate the designations of the ratios, the formulas and the studies where this ratio is referred to.

Operating Ratios and Indicators – Rooms

Firstly, Table 1 presents the operating ratios and indicators of rooms department.

Table 1. Summary of Operating Ratios and Indicators – Rooms

Designations	**Formulas**	**Studies**
Room Occupancy Percentage or Occupancy Rate	$\frac{\text{rooms sold}}{\text{rooms available}} \times 100$ $\frac{\text{rooms occupied}}{\text{rooms available}} \times 100$ $\frac{\text{Number of rooms let in hotel}}{\text{Total rooms in hotel}}$	Chin & Barney (1995); Phillips (1996); Anderson et al. (1999); Singh & Schmidgall (2002); Planas (2004); Jagels & Coltman (2004); Pine & Phillips (2005); AECA (2005); Larry & Gu (2007); Melia & Robinson (2010); Jorge (2010); Amat & Campa (2011); O´Neill & Carlback (2011); Lamelas & Filipe (2012); Jones et al. (2012); Nunes e Machado (2012); Harris (2013); Tuta & Micu (2013); Sainaghi et al. (2013); Dodu & Patrichi (2014); HANYC (2014); Guilding (2014); Ogbeide (2014); Hua et al. (2015); Bhamornsathit & Katawandee (2016); Santos et al. (2016); Lado-Sestayo et al. (2017); Barreda et al. (2017) ; Hua et al. (2018); Gomes et al. (2018); Ribeiro et al. (2019); Nalley et al. (2019); Peña et al. (2017).
Paid Occupancy Percentage	$\frac{\text{Number of rooms sold}}{\text{Total rooms in hotel}}$	Guilding (2014)
Average Daily Rate (ADR) or Average Room Rate (ARR)	$\frac{\text{Room revenue}}{\text{Rooms sold}}$ $\frac{\text{Daily rooms sales revenue}}{\text{Daily rooms occupied}}$ $\frac{\text{Day's revenue from room letting}}{\text{Number of rooms let in the day}}$	Chin & Barney (1995); Phillips (1996); Anderson et al. (1999); Singh & Schmidgall (2002); Jagels & Coltman (2004); Planas (2004); AECA (2005); Larry & Gu (2007); Wadongo et al. (2010); Melia & Robinson (2010); Jorge (2010); Amat & Campa (2011); Schmidgall (2011); O´Neill & Carlback (2011); Lamelas & Filipe (2012); Jones et al. (2012); Nunes e Machado (2012); Harris (2013); Tuta & Micu (2013); Sainaghi et al. (2013); Dodu & Patrichi (2014); Ogbeide (2014); HANYC (2014); Guilding (2014); Hua et al. (2015); Bhamornsathit & Katawandee (2016); Santos et al. (2016); Barreda et al. (2017); Hua et al. (2018); Gomes et al. (2018); Nalley et al. (2019);
Average Room Rate Per Revenue Segment	$\frac{\text{Gross room rev. for rev. segment}}{\text{segment rooms sold}}$	HANYC (2014)
Revenue Per Available Room (RevPAR)	$\frac{\text{Rooms revenue}}{\text{Rooms available}}$ $\frac{\text{Total daily room letting revenue}}{\text{Total hotel rooms}}$ Occupancy percentage × ADR	Chin & Barney (1995); Phillips (1996); Singh & Schmidgall (2002); Planas (2004); Jagels & Coltman (2004); Pine & Phillips (2005); AECA (2005); Larry & Gu (2007); Jorge (2010); Schmidgall (2011); O´Neill & Carlback (2011); Lamelas & Filipe (2012); Jones et al. (2012); Nunes e Machado (2012); Harris (2013); Sainaghi et al. (2013); Tuta & Micu (2013); HANYC (2014); Dodu & Patrichi (2014); Guilding (2014); Ogbeide (2014); Hua et al. (2015); Bhamornsathit & Katawandee (2016); Santos et al. (2016); Barreda et al. (2017) ; Hua et al. (2018); Gomes et al. (2018); Ribeiro et al. (2019); Nalley et al. (2019);
Revenue Per Available Room (RevPAR)	$\frac{\text{Hotel revenue}}{\text{Number of rooms available}}$	Amat & Campa (2011); Peña et al. (2017)

continued on following page

Table 1. Continued

Designations	**Formulas**	**Studies**
Average Occupancy Per Room	$\frac{\text{number of customers}}{\text{number of rooms sold}}$ $\frac{\text{number of customers}}{\text{number of rooms occuppied}}$	AECA (2005); Amat & Campa (2011); Santos et al. (2016); Gomes et al. (2018)
Total Revenue Per Available Room (TRevPAR)	$\frac{\text{Total revenue}}{\text{Rooms available}}$	Jones et al. (2012); HANYC (2014) Sainaghi et al. (2013); Santos et al. (2016); Lado-Sestayo et al. (2017); Gomes et al. (2018) ; Peña et al. (2017)
Revenue Per Available Customer (RevPAC)	$\frac{\text{Total revenue from hotel guests}}{\text{Total number of guests}}$	Singh & Schmidgall (2002); Schmidgall (2011); Santos et al (2016); Gomes et al. (2018)
Cost Per Occupied Room (CPOR)	$\frac{\text{rooms cost}}{\text{rooms sold}}$ $\frac{\text{Total daily room servicing costs}}{\text{Number of rooms serviced in a day}}$	Guilding (2014); Santos et al. (2016); Gomes et al. (2018)
Gross Operating Profit Per Available Room (GOPPAR)	$\frac{\text{Gross operating profit}}{\text{Number of available rooms}}$	Planas (2004); Amat & Campa (2011); Schmidgall (2011); Jones et al. (2012) ; Harris (2013); Sainaghi et al. (2013) ; Santos et al. (2016); Gomes et al. (2018) ; Peña et al. (2017)
Gross Operating Profit Per Occupied Room (GOPPOR)	$\frac{\text{Gross operating profit}}{\text{Number of rooms occupied}}$	Amat & Campa (2011)
Yield Percentage or Room Yield	$\frac{\text{Room revenue}}{\text{Maximum potential room revenue}}$	Jones et al. (2012); Harris (2013); Guilding (2014)
Cost Per Available Room (CostPAR)	$\frac{\text{Room expenses}}{\text{Number of rooms available}}$	Harris (2013)
Number of Rooms Serviced Per Employee	$\frac{\text{Number of rooms serviced}}{\text{Number of employees}}$	Harris (2013)
GOP Per Employee	$\frac{\text{GOP}}{\text{Number of employees}}$	Planas (2004)

continued on following page

Table 1. Continued

Designations	Formulas	Studies
Revenue Per Occupied Room (RevPOR)	$\frac{\text{Hotel revenue}}{\text{Number of rooms occupied}}$	AECA (2005); Amat & Campa (2011); Schmidgall (2011)*
Complimentary Occupancy	$\frac{\text{Complimentary rooms occupied}}{\text{Rooms available}}$	Schmidgall (2011); Guilding (2014); HANYC (2014)
Multiple Occupancy or Double Occupancy	$\frac{\text{Rooms occupancy by two or more people}}{\text{Rooms occupancy by guests}}$	Jagels & Coltman (2004); AECA (2005); Schmidgall (2011); Jones et al. (2012); Harris (2013); Santos et al. (2016); Gomes et al. (2018) ;
Employees Per Available Room	$\frac{\text{Number of employees}}{\text{Rooms available}}$	Planas (2004); AECA (2005)
Average Length of Stay	$\frac{\text{Rooms occupied}}{\text{Arrivals}}$	AECA (2005); HANYC (2014); Peña et al. (2017).

Source: Adapted from Gomes et al. (2017b)

Operating Ratios and Indicators – F&B

Secondly, Table 2 presents the operating ratios and indicators of F&B department.

Operating Ratios and Indicators – all operating departments

Thirdly, Table 3 lists operating ratios and indicators related to all departments.

THE PROFESSIONALS' PERSPECTIVE

According to Gomes et al. (2017), considering a database of 41 hotels, it was found a set of operating ratios and indicators belonging to three groups (rooms department, F&B department and other departments) which was considered the more important to small and independent hotels.

Regarding rooms department, the Figure 1 shows the importance, highlighting ADR, Room occupancy, average occupancy room and RevPAR.

In relation to the department of F&B according to the Figure 2 beverage cost percentage and food cost percentage stand out.

The "labour cost percentage" reached the high level in the set of other ratios and indicators (Gomes et al., 2017).

Based on all these data, and considering the most referred to in the literature review and the ones that are provided in literature, Gomes et al (2017) provided three tables (Table 14.4 to Table 14. 6) where

Figure 1. Importance of the operating ratios and indicators – rooms department
Source: Gomes et al. (2017)

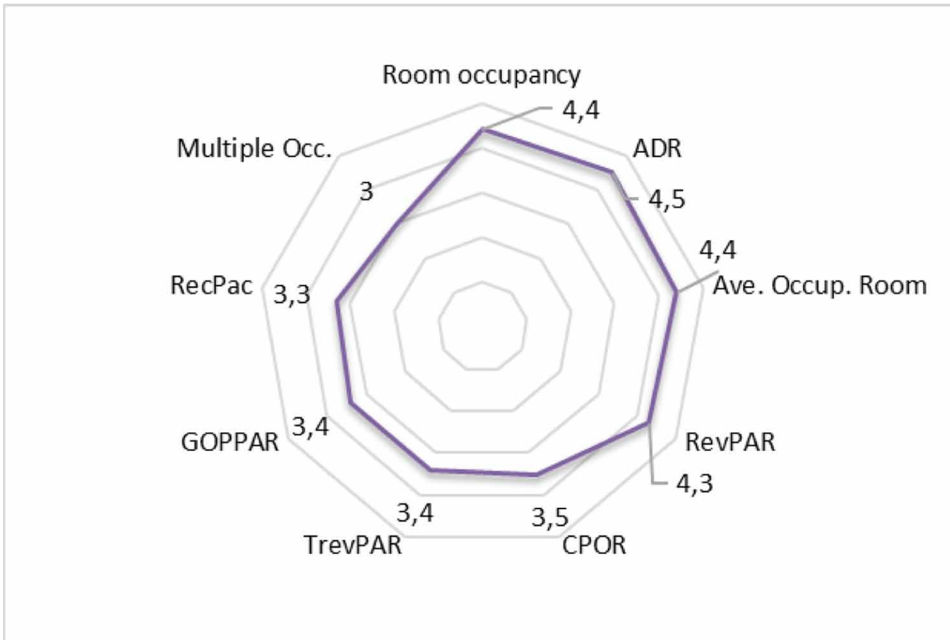

Figure 2. Importance of the operating ratios and indicators - F&B department
Source: Gomes et al. (2017)

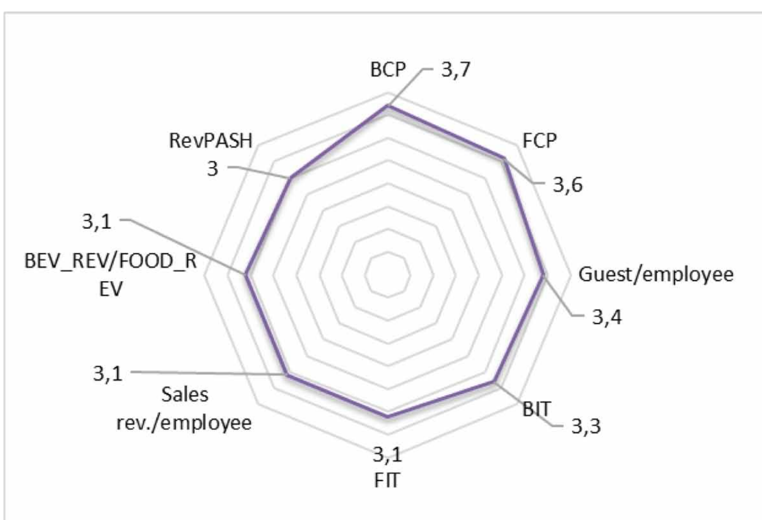

Table 2. Operating Ratios and Indicators – F&B

Designations	Formulas	Studies
Food inventory turnover	$\frac{cost\ of\ food\ sold}{average\ inventory\ during\ the\ period}$ $\frac{cost\ of\ food\ used}{average\ inventory\ during\ the\ period}$	Jagels & Coltman (2004) ; Schmidgall & DeFranco (2004) ; Santos *et al.* (2016); Gomes et al. (2018)
Beverage inventory turnover	$\frac{cost\ of\ beverage\ sold}{average\ inventory\ during\ the\ period}$	Schmidgall & DeFranco (2004); Santos *et al.* (2016); Gomes et al. (2018) ;
Food cost percentage	$\frac{cost\ of\ food\ sold}{food\ revenue} \times 100$	Singh & Schmidgall (2002); Miller *et al.* (2002); Dittmer (2003); Schmidgall & DeFranco (2004); Jagels & Coltman (2004); Wadongo et al. (2010); Melia & Robinson (2010); Schmidgall (2011); Cote (2012); Harris (2013); HANYC (2014); Ogbeide (2014); Bhamornsathit & Katawandee (2016); Santos *et al.* (2016); Gomes et al. (2018)
Beverage cost percentage	$\frac{cost\ of\ beverage\ sold}{beverage\ revenue} \times 100$	Singh & Schmidgall (2002); Miller *et al.* (2002); Dittmer (2003); Jagels & Coltman (2004); Schmidgall & DeFranco (2004); Melia & Robinson (2010); Schmidgall (2011); Cote (2012); Harris (2013); Ogbeide (2014); HANYC (2014); Bhamornsathit & Katawandee (2016); Santos *et al.* (2016); Gomes et al. (2018)
Covers per employee hour worked	$\frac{Number\ of\ covers\ served\ in\ period}{Employee\ hours\ worked\ in\ a\ period}$	Guilding (2014)
Number of guests per employee	$\frac{Guest\ served}{no.of\ employees}$	Jagels & Coltman (2004); Jorge (2010); Nunes e Machado (2012); Harris (2013); Santos *et al.* (2016); Gomes et al. (2018)
Revenue per employee	$\frac{Food\ and\ beverage\ revenue}{Number\ of\ employees}$	Harris (2013); Santos *et al.* (2016); Gomes et al. (2018)
Revenue per employee hour worked	$\frac{Restaurant\ revenue}{Number\ of\ employee\ hours\ worked}$	Chin & Barney (1995); Guilding (2014)
Seat turnover ratio	$\frac{number\ of\ guests}{seats\ available}$ $\frac{Number\ of\ covers\ served\ per\ day}{Number\ of\ restaurant\ seats}$ $\frac{Covers\ served\ in\ a\ period}{number\ of\ seats \times number\ of\ days\ open}$	Chin & Barney (1995); Wadongo et al. (2010); Schmidgall (2011); Cote (2012); Harris (2013); Guilding (2014); Santos et al.(2016); Gomes et al. (2018)

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Table 2. Continued

Designations	Formulas	Studies
Revenue per available seat (RevPAS)/average food sale per seat	$\frac{total\ F\ \&\ B\ revenue}{no.of\ available\ seats}$	Jagels & Coltman (2004); Lukianoff (2005); Melia & Robinson (2010); Jorge (2010) ; Cote (2012); Nunes e Machado (2012); HANYC (2014); Santos et al. (2016); Gomes et al. (2018)
Revenue per available seat hour (RevPASH)	$\frac{daily\ F\ \&\ B\ revenue}{no.of\ available\ seats \times no.of\ working\ hours}$	Kimes, Barrash & Alexander (1999); Kimes (1999); Lukianoff (2005) Santos et al. (2016); Gomes et al. (2018)
Revenue yield per seat	$\frac{Total\ restaurant\ revenue}{Number\ of\ restaurant\ seats}$	Guilding (2014)
Percentage of Beverage Revenue to Food Revenue/ Beverage/food sales ratio	$\frac{beverage\ revenue}{food\ revenue}$	Jagels & Coltman (2004); Cote (2012); Santos et al. (2016); Gomes et al. (2018)
Average food service check (AFSC)/average spend per head/ sales revenue per server/F&B venue revenue per customer/ Average food check	$\frac{Total\ food\ revenue}{Number\ of\ food\ covers}$ $\frac{food\ revenue}{number\ of\ guests}$	Chin & Barney (1995); Singh & Schmidgall (2002); Planas (2004); Jagels & Coltman (2004); Wadongo et al. (2010); Schmidgall (2011); Cote (2012); Harris (2013); Guilding (2014); HANYC (2014)
Average food cost per guest (AFCG)	$\frac{food\ cost}{number\ of\ guests}$	Jagels & Coltman (2004)
Average cost per guest (ACG)	$\frac{total\ cost}{number\ of\ guests}$	Jagels & Coltman (2004)
Average operating income per guest (AOIG)	$\frac{operating\ income}{number\ of\ guests}$	Jagels & Coltman (2004)
Average beverage spend	$\frac{Beverage\ revenue}{Number\ of\ covers}$	Harris (2013)
Catering/banquet per square foot	$\frac{Catering\ and\ banquet\ revenue}{Square\ of\ function\ space}$	HANYC (2014)
Profit per available seat hour (ProPASH)	$\frac{Profit}{total\ number\ of\ available\ seats}$	Heo (2017)

continued on following page

Table 2. Continued

Designations	Formulas	Studies
Profit per available square meter (ProPASM)	$\frac{Profit}{available\ space\ in\ square\ meter}$	Heo (2017)
Total F&B revenue per available room	$\frac{ProfitTotal\ F\ \&\ B\ revenue}{rooms\ available}$	HANYC (2014)
Cost per customer	$\frac{total\ labour\ costs\ and\ related\ expenses}{number\ of\ customers}$	HANYC (2014)

Source: Adapted from Gomes et al. (2017b)

Table 3. Operating Ratios and Indicators – All Operating Departments

Description	Formula	Studies
Efficiency Ratio	$\frac{department\ cost}{departament\ revenue} \times 100$	Planas (2004); Santos et al. (2016); Gomes et al. (2018)
Operating efficiency ratio	$\frac{Gross\ operating\ profit}{Total\ revenue}$	Schmidgall (2011)
Labour cost percentage	$\frac{Department\ payroll\ and\ related\ expenses}{Department\ revenue}$ $\frac{total\ labour\ costs}{total\ revenue}$ $\frac{Payroll\ costs}{Total\ revenue}$	Singh & Schmidgall (2002); Schmidgall & DeFranco (2004); Jagels & Coltman (2004); Planas (2004); Wadongo et al. (2010); Melia & Robinson (2010); Schmidgall (2011); Jones et al. (2012); Harris (2013); Ogbeide (2014) ; Santos et al. (2016) Bhamornsathit & Katawandee (2016); Gomes et al. (2018) ; Peña et al. (2017).
Department gross operating profit per available room	$\frac{Department\ gross\ operating\ profit}{Number\ of\ rooms\ available}$	Amat & Campa (2011)
Department gross operating profit per occupied room	$\frac{Department\ gross\ operating\ profit}{Number\ of\ rooms\ occupied}$	Amat & Campa (2011)

Source: Adapted from Gomes et al. (2017b)

are indicated the ratios more referenced in the literature, provided by hotel monitor and more important in the study.

In Portugal, if hotels are associated to Associação da Hotelaria de Portugal (AHP, in English, Portuguese Association of Hospitality) and provide some information, they can obtain information about average values of operating ratios and indicators.

There is a database called "Hotel Monitor", where the average values of hotel industry ratios and indicators are calculated. The ratios and indicators provided by the "Hotel Monitor" are Occupancy Rate, ARR, RevPAR, TRevPAR, Yield Percentage, Complimentary Occupancy and Multiple Occupancy.

A comparison was made.

Table 4. Comparison - Rooms department

Designation	Authors	Hotel Monitor	Study
Room occupancy percentage/Occupancy rate	×	×	×
Average daily rate (ADR) or Average room rate (ARR)	×	×	×
Revenue per available room (RevPAR)	×	×	×
Total revenue per available room (TRevPAR)	×	×	×
Gross operating profit per available room (GOPPAR)	×		×
Yield percentage/room yield	×	×	
Complimentary occupancy	×	×	
Average occupancy per room	×		×
Multiple occupancy/Double occupancy	×	×	×

Source: Adapted from Gomes et al. (2017)

Table 5. Comparison- F&B department

Designations	Authors	Study
Food inventory turnover	×	×
Food cost percentage	×	×
Beverage cost percentage	×	×
Number of guests per employee	×	×
Revenue per available seat hour (RevPASH)	×	×
Percentage of Beverage Revenue to Food Revenue	×	×

Source: Gomes et al. (2017)

Table 6. Comparison- All Operating Departments

Designations	Authors	Study
Labour cost percentage	×	×

Source: Gomes et al. (2017)

Table 7. Rooms

Revenue	Actual	Budget
Transient Rooms revenue		
Retail		
Direct clients		
Hotel website clients		
Travel agencies clients		
Wholesaler		
Group rooms revenue		
Corporate		
Tour/Wholesales		
Online operators' clients		
Tour-Operators clients		
Other revenue		
Total rooms revenue		
Expenses		
Labour costs and related expenses		
Salaries and wages		
Payroll taxes		
Training		
Bonuses and Incentives		
Contracted, leased and outsourced labour		
Total labour costs and related expenses		
Other expenses		
Amenities		
Cleaning Supplies		
Commissions		
Complimentary Services/Gifts		
Corporate Office Reimbursables		
Decorations		
Entertainment		
Laundry and Dry Cleaning		
Linen		
Licenses and Permits		
Miscellaneous		
Postage and overnight delivery charges		
Printing and stationery		
Reservations		
Uniforms		
Total other expenses		
Departmental profit		

Table 8. Food and Beverage

Revenue	*Actual*	*Budget*
Venue Food Revenue		
Venue Beverage Revenue		
In-Room Dining Food Revenue		
In-Room Dining Beverage Revenue		
Other Revenue		
Expenses		
Cost of Sales		
Cost of Food Sales		
Cost of Beverage Sales		
Total Cost of Food and Beverage Sales		
Labour costs and related expenses		
Salaries and wages		
Payroll taxes		
Training		
Contracted, leased and outsourced labour		
Total labour costs and related expenses		
Other expenses		
Banquet Expenses		
China		
Cleaning Supplies		
Decorations		
Equipment rental		
Flatware		
Glassware		
Kitchen Fuel		
Kitchen Smallwares		
Laundry and dry cleaning		
Menus and Beverage Lists		
Miscellaneous		
Uniforms		
Total other expenses		
Departmental profit		

SOLUTIONS AND RECOMMENDATIONS

The findings demonstrate that USALI should be adapted by micro and small hotels, by selecting the most relevant schedules and removing several items. Results also evidence that an operating scorecard must include useful ratios and indicators for micro and small independent hotels.

Simplified Hospitality Management Accounting Schedules

Gomes et al (2017a) have researched the USALI against the small independent hotels. The survey tried to identify the significant revenues items and the significant expense items in all hotel departments:

- The room revenue items, that were highlighted, were Corporate, Retail, Tour/Wholesalers, Wholesalers, Other Revenue.
- In the F&B department, the important items were venue beverage revenue, venue food revenue, in-room dining beverage revenue, in-room dining food revenue and other revenue.

Secondly Gomes et al. (2017a), in terms of expenses, the most important items are all related to labour cost (salaries and wages, training, payroll taxes and contracted, leased and outsourced labour). Some items of other expenses were considered essential, which were presented in the new schedules for small independent hotels.

According to the study of Gomes et al. (2017a), small independent hotels should use the following schedules (Table 14.7 to Table 14.13).

Schedules of adapted USALI are smaller than the schedules that are provided by USALI and they have only the items which were mentioned by hoteliers. It is important to say that all the proposed schedules have been elaborated considering the terminology used by USALI.

Table 9. Administrative and General

Expenses	*Actual*	*Budget*
Labour costs and related expenses		
Salaries and wages		
Payroll taxes		
Training		
Total labour costs and related expenses		
Other expenses		
Bank Charges		
Commissions		
Contract Services		
Corporate Office Reimbursable		
Miscellaneous		
Office Equipment		
Payroll Processing		
Postage and overnight delivery charges		
Security		
Total other expenses		
Total expenses		

Table 10. Information and Telecommunications

Expenses	*Actual*	*Budget*
Labour costs and related expenses		
Salaries and wages		
Payroll taxes		
Training		
Total labour costs and related expenses		
Other expenses		
Cost of Long-Distance Calls		
Hardware		
Miscellaneous		
System storage optimization		
Total other expenses		
Total expenses		

Table 11. Utilities

Expenses	*Actual*	*Budget*
Electricity		
Gas		
Water		
Total expenses		

Table 12. Sales and Marketing

Expenses	*Actual*	*Budget*
Labour costs and related expenses		
Salaries and wages		
Payroll taxes		
Training		
Total labour costs and related expenses		
Other expenses		
Collateral material		
In-house graphics		
Miscellaneous		
Loyalty Programs		
Miscellaneous		
Outside services market research		
Photography		
Promotion		
Total other expenses		
Total expenses		

Table 13. Property Operations and Maintenance

Expenses	*Actual*	*Budget*
Labour costs and related expenses		
Salaries and wages		
Payroll taxes		
Training		
Total labour costs and related expenses		
Other expenses		
Building		
Electrical and Mechanical Equipment		
Electricity		
Elevators & Escalators		
Furniture and Equipment		
Kitchen Equipment		
Laundry Equipment		
Licenses and Permits		
Life/Safety		
Light Bulbs		
Miscellaneous		
Painting and Wallcovering		
Plumbing		
Swimming Pool		
Waste Removal		
Total other expenses		
Total expenses		

Operating Scorecard

The small independent hotels should use the following operating scorecard (Table 14.14) for future decision making.

CONCLUSION

USALI can be adapted by large and small hotels, it is simply necessary to select schedules and remove not used frequently items. Therefore, it was carried out a research in order to ascertain the necessary departments as well as which accounts to use. Regarding revenue items and expenses items, schedules were created to be used by independent hotels. Moreover, the expenses items with the highest scores are related to labour costs. To sum up, it is necessary to reduce schedules and a lot of items, but this

Table 14. Operating Scorecard

Ratios	Budget	Actual	Variance	Corrective measure
Room occupancy percentage				
ADR				
RevPAR				
TRevPAR				
GOPPAR				
Yield percentage				
Complimentary occupancy				
Average occupancy per room				
Multiple occupancy				
Food inventory turnover				
Food cost percentage				
Beverage cost percentage				
Number of guests per employee				
RevPASH				
Percentage of Beverage Revenue to Food Revenue				
Labour cost percentage				

Source: Gomes et al. (2017)

is a process that will encourage the implementation of adapted USALI into small independent hotels, enabling a more competitive management.

Considering all the ratios and indicators in the literature, it is realistic to state that ratios can be calculated in several ways, which represents hard work among hoteliers towards standardization. This problem was identified in all the categories: rooms, F&B and all operating departments. After gathering the ratios and indicators in the literature review with the most important for hoteliers involved in this study and considering the ratios included in hotel monitor, an operating scorecard adapted to small independent hotels was created. Each ratio and indicator must be present at least in two of the three in order to be included in the operating scorecard.

For managers of independent hotels, this chapter should be very helpful, because USALI and operating ratios and indicators were adapted to their needs. Thus, the main contributions of this research chapter are mainly directed to micro and small-sized hotel managers, whom have available easier hospitality management accounting schedules and operating scorecard.

In the future it will be necessary more research in hospitality management accounting so that hoteliers' decision-making is simplified. The management of hotels is mutable as well as the surrounding environment, so the information that managers need is always changing. This will require new additions in management accounting.

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Chapter 15
Agrotourism as an Opportunity to Enhance the Development and Competitiveness of Rural Areas

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ABSTRACT

Rural tourism increases income sources for rural residents, reduces rural population outflow, and preserves cultural traditions. This chapter considers development of agrotourism in a rural region like the Omsk region, and agrotourism potential of each Omsk district is assessed. To assess the agrotourism potential, integral and rating indicators were calculated using secondary data and the assessment of 40 experts. The analysis allowed a rating of Omsk's municipal districts. Based on the results, the Southern forest-steppe zone has the highest potential for the development of agrotourism. Several other districts present good conditions to increase the potential of agrotourism development. Some districts are distinct, but conditions for the development of agrotourism exist in all areas of the Omsk region.

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INTRODUCTION

Agrotourism is the sector of the tourist industry oriented to use natural, cultural, historical and other existent resources of rural areas and its features for the creation, growth and development of a complex tourist product. Being considered a subset of rural tourism the concept is more complex and presents a vaste socio-economic and landscape impact (Lupi, Giaccio, Mastronardi, Giannelli, & Scardera, 2017; Dubois, Cawley, & Schmitz, 2017). The creation of jobs and, therefore, the enhancement of employment among the residents is one of the main positive social impacts of rural tourism. As mentioned by Sgroi, Donia and Mineo (2018) agrotourism allows agriculture enterprises to remain in there rural location and to unemployed members of farming families to find a full employment namely, providing services for visitors. Hence, the expansion of a path directed to the progress of this type of tourism is a straightway for social development of depressed rural areas avoiding the abandon and consequent degradation of rural areas suffering from permanent outflow of population, in particular, due to a work absence reason. Indeed, agrotourism has proved to be a potential source of additional income and services opportunities for traditional farmers (Maria-Irina, 2017).

Omsk region (hereafter also called just Omsk), a region located in the Russian Federation, faces the abovementioned social problem. Simultaneous, in the region, is observed a lack of organizational and economic mechanisms able to create, integrate and develop the agrotourism potential of Omsk. This problem arose in connection with the need to improve the level of development of the region's rural areas, which are currently in economic and social crisis. One of the main directions to withdraw these rural territories from the economic and social crisis lays in the diversification of the rural economy. The specificity of the Omsk region, its territorial, historical and cultural features will allow to define new directions and development paths for economic diversification throughout the development of its agrotourism potential.

The value added of the present research work relies on the identification and analysis of the territorial and historical-cultural characteristics of the region countryside, specifically the ones related with agritourism, to improve the organizational and economic mechanisms that engage the population and private investors in agrotourism activities. Indeed, the main objective of the study is to analyse the rural tourism potential of the Omsk region. The main specific objectives of the study go through an analysis of the actual and potential opportunities for the development of agrotourism in Omsk and the development of organizational and economic mechanisms for the creation and development of agrotourism activities in the region, by the population living in the rural areas or through private investors.

To reach the main and specific objectives, statistical information was collected taking in account the presence on the Omsk territory of objects that are suitable to perform rural tourism activities. A SWOT analysis of Omsk region rural tourism is also carried out. Comprehensive and rating methods for assessing the tourism potential of rural areas were used on the empirical study following a methodology proposed to allow a comparative assessment of the potential for agrotourism development in rural areas. The identification and assessment of potential opportunities for the development of agrotourism in Omsk are carried out both at the level of individual rural areas and for the region as a whole. All the empirical analysis is made after presenting a general theoretical framework of the agrotourism concept and the region of Omsk.

Successful implementation of the proposed method of empirical analysis will help: (i) to increase the employment levels of the rural population, and hence avoid the outflows of the residents, (ii) to promote the preservation of small settlements, (iii) the rational and efficient use of natural resources through the use of unemployed fundamental resources, as land, in rural areas, (iv) the retention of the young population in rural areas, (v) to develop the civil, production and social infrastructures of rural settlements, and (vi) reload local financial budgets.

The first section of the chapter is devoted to the literature review on the concept of agritourism and, in particular, on its role in the development and enhancement of the competitiveness of the territories (namely the rural ones). The section also approaches the assessment of the agrotourism potential. In the second section, the current level of agrotourism development in the Russia Federation, in general, and the Omsk region, in particular, is highlighted. In a third part of the chapter, the methodology for conducting the study is presented and explained, after the goals being set and the statistical data collection and analysis are described. In the fourth part, the results obtained from the application of the method of analysis are presented and critically analysed. In conclusion, several remarks on recommendations for the development and enhancement of the competitiveness of rural areas are supplied.

DEFINITION OF RURAL TOURISM AND ITS ROLE ON THE DEVELOPMENT OF RURAL AREAS

Currently, the urban population that is increasingly growing feels the need for recreation in contact with nature. Urbanization, harm ecologic impacts and other negative factors resulting from the modern life increase the desire of residents of megacities to relax away from the city vanity.

In 2016, 1.7 billion people – 23% of the world's population - lived in a city with at least 1 million inhabitants. According to projections, by 2030, 27% of people worldwide will be concentrated in cities with at least 1 million inhabitants. Moreover, between 2016 and 2030, the population in all city size classes is projected to increase, while the rural population is foreseen to decline. By 2030 the population of rural areas will slowly decrease from 45 to 40% (United Nations, 2016). At the same time, the contribution of tourism to enhance employment is also expected to rise from 8.1%, across the world in 2010, to 9.2% by 2020 (Daniloska & Naumova-Mihajlovska, 2015). The projections, both in the number of people living in cities and employment, renewed the debate on the relative merits of different approaches to regional development (McFarlane, Blackwell, Mounter, & Grant, 2016). One of these approaches is provided by agrotourism, in all its possible varieties and forms.

It is important to recognize the crucial factors for the development of territories, namely the rural ones. According to Trukhachev (2015), in most developed countries the rural community does not have a decisive influence on the Gross Domestic Product (GDP). At the same time arise problems regarding the resources needed for economic growth in small or sustainable environments and the preservation of rural communities for future generations. Rural communities suffer from industrialization and urbanization. In such a transition from a "pure rural" to an "industrially rural" society, rural sustainability development is necessary. Still, should be stressed that sustainability in rural areas is not just a concept related with the sustainable economic growth. The concept of sustainability in rural areas should integrate environmental, economic, cultural and social factors. Every component is vital but the last factor mentioned is the most critical one. The specificities of agricultural production determine the main bottleneck: the possibility of replacing labour and land production resources by capital in the such rural regions is limited. Moreover, people who are attracted to higher standards of living in urban areas tend to leave traditional rural areas (Erokhin et al., 2014; Erokhin, Heijman, & Ivolga, 2014). That is why the vital issue is how to retain rural inhabitants in their traditional environment by means of provision of sustainable employment and income.

World practice demonstrates that, primarily, rural tourism was designed to stimulate domestic tourist flows and was intended for domestic citizens. In the course of its development, it became also attractive to foreigners. Agrarian tourism, in many countries of the world, has turned into a big sector of the tourism industry, focused on the use of various resources of rural areas - natural, cultural, historical and other - for the creation of a comprehensive tourism product (Ostapenko, 2013). So, the importance of rural tourism has been widely recognized as an important factor in the development of rural areas (Sasu & Epuran, 2016).

However, it is difficult to find a single common concept for a common understanding of this type of tourism activity. Rural tourism is a single term that covers different types of tourism, such as agritourism, ethnic tourism, ecotourism, creative and cultural tourism or culinary tourism. Since this research work as its focus is agrotourism, this is the type of rural tourism that will be highlighted and defined.

Agrotourism uses the farm as the main place for activities. The word "agrotourism" may include several ideas, which can be defined as individual (related to particular regions since it can improve the lives of village residents) or more general (related to society as a whole as creating and improving technical and social infrastructure of the countryside). Regarding local development, agrotourism includes local employment creation, provision of additional incomes, labour gap filling, local cooperative development, plus empowerment and control, especially for women through the acquisition of new skills, sources of income and qualifications (Karampela, Kizos, & Spilanis, 2016). In this context, agrotourism is increasingly seen as a "desirable diversifier" for local and regional economy. Simultaneously, presents a positive external influence by increasing the supply of local services and a less obvious social contribution concerning the increase of places for rest, especially in marginal peripheral regions (Butler & Rogerson, 2016). Typical of the agrotourism is the night permanence of tourists in peasant houses, and not in specially arranged places, such as boarding houses or hotels. Tourists actively participate in daily chores and therefore the feel the authentic nature of the tourist experience (Sasu & Epuran, 2016).

According to the results of the literature review on the topic, five distinguished indicators describe agrotourism. Agrotourism should: (1) be addressed to nature and based predominantly on the use of natural resources; (2) not cause damage or (if that is impossible) should minimize damages on the natural habitat, i.e., should be environmentally sustainable; (3) aimed at environmental education and the establishment of relations of equal partnership with nature; (4) care for the preservation of the local socio-cultural sphere; and, (5) be economically effective and ensure the sustainable development of those areas where it is implemented.

Rural tourism is one of the fastest growing economic segments that deals with challenges and opportunities of global competitive market (Snieška, Barkauskienė, & Barkauskas, 2014). Sustainable development is mostly understood as a holistic concept with complex interrelation between social, economic, and environmental aspects of development (Daniloska & Naumova-Mihajlovska, 2015).

In terms of economic aspects, it is important to stress that rural tourism makes preferential use of not costly resources (natural, sociocultural, and historical heritage). Moreover, in a situation of degradation of rural regions and crisis in the agrarian sector, agrotourism acts as an income source for rural population and allows them to make improvements in their own houses or real estates that lead to the increase in their market value and attractiveness for tourists. Regarding sociocultural aspect, it is very important the interaction between rural residents and foreigners (which allows mutual psychological and cultural enrichment during the interaction). Besides, arises the self-assessment of residents due to the increase in the demand. Rural tourism gives. also, the opportunity to activate cultural and historical resources and to disseminate and promote cultural regional traditions, with important impacts on ethnocultural aspects. Finally, rural tourism is important regarding personal aspects. It allows the development of the personality of residents by, first of all, making them to accept the need to acquire new knowledge and skills to receive better the visitors, and after, by increasing the awareness of economic independence.

Planning for sustainable tourism development should help plan for environmental conservation and includes a high amount of research and analysis before deciding on the direction of development (Angelevska-Najdeska & Rakicevik, 2012). The sustainable development of tourism ensures the integrity of the place because travelers are aware of the importance of preserving sites that emphasize local character, architecture, traditional cuisine, heritage, aesthetic values and ecology. In exchange, tourism revenues increase local experience and bring great benefits to local residents and tourist institutions (such as hotels, motels, restaurants, travel agencies and, in the case or rural tourism, farms). Employers tend to hire and train more local residents. Tourists tend to buy local products and use local services. Sustainable tourism saves resources, teaches to respect local culture and traditions, does not abuse of food (weighs quality and not quantity) means exceptional trips and satisfied customers. Satisfied and excited visitors bring with them new knowledge and direct their friends to try the same thing, visit these places and experience the same beauty as themselves, thus ensuring the continuity of operations and destination (Angelkova, Koteski, Jakovlev, & Mitrevska, 2012).

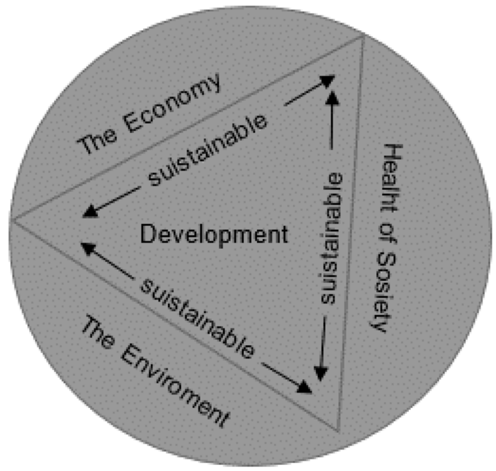
In addition, rural tourism can act as a development tool for the revitalization of already-declining traditional industries. Rural tourism stimulates local economic by establishing foreign sources of revenue. Tourism provides people in rural areas with the means of securing economic advantages. Thus, rural tourism is increasingly viewed as a tool for improving economic and social conditions by providing the farming, craft, and service sectors with a supplementary source of income, an opportunity to realize the economic value of specific high quality locally produced food products, and the opportunity to reevaluate the heritage symbols and identity. These benefits result in economic growth with new sources of income and employment created through tourism activities (Rasoolimanesh, Ringle, Jaafar, & Ramayah, 2017).

The development of rural tourism at the community level means that the community plays a decisive role in the development of tourism. Village residents can specialize themselves in specific activities, such as growing cattle, planting vegetables, producing local crafts and organizing cultural events and entertainment. The localization of the supply chain encourages the use of local labour and local materials to maximize the benefits to the community (Giannakis, 2014; Streimikiene, & Bilan, 2015).

Rural development is a deliberate process of sustained and sustainable economic, social, political, cultural and environmental change, designed to improve the quality of life of the local population of a rural region. Although tourism, in general, is not mentioned into the original definition, it is not hard to conclude that it can be incorporated into the sustainable development concept if it respects its three main principles presented in Figure 1 (Daniloska, & Naumova-Mihajlovska, 2015).

Economic development leads to a more productive use of resources and provides more opportunities for producers and consumers increasing human well-being. Rural society with its resources - natural, financial, human and managerial - is the object of rural development, subordinated to the relations of regional development. Indeed, regional development theory defines rural development as a change that includes not only certain economic indicators but also the welfare of the rural population in order to solve their basic problems and seize opportunities for economic growth. Residents of one region participate in its development and bear the consequences (Surchev, 2010). Tourism can influence host communities economically, socially, and environmentally. As already mentioned, but important to stress again, the

Figure 1. Sustainable development triangle
Source: Daniloska and Naumova-Mihajlovska (2015, p.2).



positive economic impacts of tourism include increased household income, improved standards of living, the creation of more jobs and employment opportunities, and, consequently the flows of tax revenues (Kreag, 2001). The concept of sustainable tourism development involves balanced economic, social and cultural development without endangering the environment, which enables a development stage of the same or higher level than previously. Sustainable development is a process that allows to achieve higher levels of growth and development without dilapidation or exhaustion of resources on which it is based (Angelevska-Najdeska & Rakicevik, 2012).

One of the fundamental guidelines of the modern economy is the developing and diversifying services. Within these, agrotourism should be regarded as an economic activity, by generating additional income for rural households by hosting activities and exploitation of local products. An argument for practising rural tourism, including its agrotourism extension, is that rural areas narrows increasingly as a result of the development of non-agricultural activities and the citizens increasingly desire to spend time in a clean environment (Ciornei, Gîndu, Jitâreanu, & Chiran, 2016). The key factor leading to success in the development of agrotourism is the support of the local population and access to natural attractions (Melo & Alencar de Farias, 2014). The local community should participate in the planning and development of tourism, especially when it comes to developing those segments of the tourism community that will benefit it. This planning approach should be applied at the local level (Angelevska-Najdeskaa & Rakicevik, 2012).

Excessive exploitation and excessive development of tourism activities often reduce the natural resources and quality of life of communities. So, if the development process ignores the point of view of communities that will lead to dissatisfaction among residents. If there are benefits of tourism activities for industry players and local communities, the vast growth of tourism without proper planning and control tends to destroy the main touristic attractions. In fact, rural areas attract tourists based on their distinct culture, history, natural environment, beautiful landscape (Erokhin, Ivolga, & Heijman, 2014; Trukhachev, 2015) and community (unique ethnicity) atmosphere. Consequently, in the absence of careful planning and management, which engage the residents, tourists can destroy the local attractions (Chin, Lo, Nair, & Songan, 2016).

According to Almstedt, Lundmark and Pettersson (2016) for tourism to benefit rural regions as a whole, tourism planning needs to be integrated into regional and local development goals. However, some researchers point to the difficulties of developing tourism in certain places such as rural ones due to the decline of rural services and declining interest in some rural areas. Tourism development may not be suitable for all rural areas. Tourism is best suited as a complement in areas with a diverse and thriving rural economy. Nevertheless, governments continue to support tourism as a growth strategy, especially in areas where seemingly few other business alternatives exist. This support is fundamental because for tourism to succeed, a number of components are required. These include: (ii) the promotion of tourist attractions, (ii) the existence of tourist infrastructure (roads, airports, trains, buses, water and energy services, parking, signage, and recreation centres), (iii) services (restaurants, lodging and other tourism-related businesses), and (iv) hospitality. It is necessary to develop tourist packages containing high-quality attractions and businesses activities that make tourists stay longer, spend more money, and return. Tourism should be seen as a system of dynamic relationships between different functional parts, balancing demand and supply. This is particular true for rural areas, as argued all over this chapter section,

CURRENT STATUS AND DEVELOPMENT TRENDS OF RURAL TOURISM IN THE REGIONS OF RUSSIA FEDERATION

The organization of a country's possibilities to rest, for the urban population, is one of the directions of agrotourism that has been successfully cultivated in Russia Federation since the end of the 19th century. Therefore, combining the accumulated experience of the Russian economy with the experience of other countries and the reality of the current market situation, the bet on agritourism can achieve the desired results: maintenance of the population in rural areas due to the increase in work opportunities and income.

According with the various aspects of rural tourism activities that were considered in the previous section and observing that rural areas in Russia Federation are cultural, geographic and natural-climatic diverse, there are many opportunities for agritourism (Kundius & Chermyanina, 2011).

In the Russia Federation, there is great potential for the development of various types of tourism. However, the path of development is slow and not systemic. According to Wegren (2016), the potential of rural tourism remains largely untapped and there is a lot of work to do. Regulatory oversight and established standards are lacking. There is no coordination among state and the private sector in rural tourism, for example. In fact, there is not even agreement about what rural tourism is and it is referred to in varying ways: green tourism, farmer tourism, ecotourism, agritourism or village tourism, among others. The entire genre has an *ad hoc* quality, encompassing a number of different activities: homestays in villages, excursions to food production and processing enterprises, cultural-ethnographic excursions and events. As tourism standards are established and regulatory oversight improves, thereby providing the tourist with more transparency about what can be expected, this business-service segment may see as presenting a robust growth that could help rural areas to survive.

In fact, Russia had a programme for the development of domestic tourism that ran between 2011-2018, however, there was no formal programme for the development of rural tourism. Tourism in rural areas is still at the stage of formation. Problems on rural areas as the lack of good roads, the destruction of the existing infrastructures, the economic crisis that affects the majority of enterprises of the agro-industrial

Figure 2. Map of Omsk region
Source: Author's own elaboration.

complex and the lack of sufficient sources of financing make it necessary to look for new ways and mechanisms for the self-organization of rural areas. Agrotourism is seen as a solution for these regions even if, according to Novikov and Zhubarkin (2013), rural tourism accounted for only about 2% of all domestic tourists within Russia Federation in 2013. There is a clear potential for growth in this market, especially because demand for rural tourism is growing in areas of heavy urbanization. In addition, more Russians are travelling domestically due to the decline of the ruble exchange rate and travel bans to Ukraine, Egypt and Turkey, which, in the past, had been popular foreign destinations.

General tourism is already developed in most exciting regions. Some popular tourist areas are Lake Baikal, the mountain areas of Altai and Sayan, Kamchatka, the Amur River valley and some locations in Yakutia. Natural landscapes have great potential for environmental tourism (ecotourism), adventure tourism or sports tourism. In other regions, not so well-known or exciting, agrotourism could help to improve the farm economy. Still, according to Novikov and Zhubarkin (2013), the regions leaders in the development of agrotourism in the country are: Kaliningrad, Leningrad and Pskov regions, Krasnodar Territory, the Republic of Bashkortostan, Karelia and Altai. Rural tourism is, also, actively being developed in some regions of the Russian Federation: Vladimir, Ivanovo, Moscow, Tver, Tula and Yaroslavl regions. Recently, domestic tourists have shown interest in ancient rural settlements, which have been preserved in remote corners untouched by civilization. In the Moscow region, there are many abandoned and destroyed villages, which are attractive for the development of ethnographic villages. In the Yaroslavl region, rural settlements have been developed, since ancient folk crafts have been preserved. The Pskov region is very popular among foreign tourists due to a huge rural bath. In Uglich, various museums are being created in the village. It is believed that every rural area in Russia can identify and develop its features, which will be interesting and demanded by lovers of rural tourism.

THE OMSK REGION

The rural tourism in the Omsk region presents a low level of development and provides an excellent opportunity for active and relaxing family holiday in the nature, treatment and recovery. To better understand this situation is important to visualize the region. The map of Omsk region is presented in Figure 2.

The region is rich in hydro-chloride mineral waters and sulfide silt therapeutic mud of the salt lakes. Mineral water and curative mud lakes in Omsk region is effective in the treatment of various diseases. Vegetation of the Northern part of the region is taiga character – the cedar, spruce and fir, cloudberries, cranberries and lingonberries. In forests, there are squirrels, sables, wolverines, foxes, lynxes, elks, reindeers and bears. In the South, in the steppe part, the flora is not abundant, but the fauna is not skimpy: gerbils, ground squirrels, foxes, wolves, badgers and ermines, steppe eagle and marsh owls. In the rivers and lakes of the region live grayling, whitefish, bream, carp, gold and silver carp, perch, perch, pike, roach, ruff and gudgeon. In Omsk, there is the practice of hunting elk, deer, roe deer, wild boar, brown bear, grouse, woodcock, ducks, geese, grouse, partridges, foxes, muskrats, beavers, marten, weasels, hares, wolves.

According to Kosenchuk and Shumakova (2015), the feasibility of agrotourism development in Omsk is defined by the following circumstances:

- Need of increasing the level of the income and employment;
- Need for modernization of engineering and transport infrastructures;
- Need of overcoming social pessimism and indifference of populations;
- Growth of popularity of alternative types of tourism;
- Relative low cost of agrotourism (rural, natural);
- Considerable natural and recreational resources on rural areas;
- Considerable housing stock in the rural areas.

For Kuzmenko and Kuznetsova (2015) the development of tourism in the region has both advantages and disadvantages. The advantages are, among others, the rapid generation of cash flows to the region, including the inflow of foreign currency; increasing Gross National Product (GNP); creation of new jobs; reformed structures which can be used by both tourists and the local population. The main drawbacks of tourism development are that tourism affects the growth of prices for local goods and services, land and other natural resources (inflation), promotes outflow of money abroad, in the event of tourist imports, and may cause environmental and social problems. For Krasnikova (2015), Omsk region possesses the developed railway system that for certain municipal districts allows to create logistic flows with the minimum use of the motor transport. However, Kirichenko (2014) refers that, nowadays, in the Omsk tourism industry it is possible to identify the following factors that negatively influence its development: the low competitiveness of accommodation facilities, poor infrastructures, the presence of improper information about Siberia, prevailing stereotypes, the differences between the proposed services and the level of actual incomes, weak intersectoral collaboration, a small selection of offers in the tourism sector and the low-quality level of services provided.

GOALS AND METHODOLOGY

The aim of this work is to understand the influence of a set of environment components to enhance the competitiveness of tourism destinations located on Omsk rural areas. The identification and assessment of potential opportunities to develop agrotourism in Omsk are performed both at the level of specific rural territories and for the entire region. Such objective requires the analysis of the resources available to develop rural tourism, such as the amount of unique natural and geological objects, cultural and historical

Table 1. Assessment of agrotourism potential in rural areas: indicators' description and measurement

Indicator	Description	Measurement
P_1	Level of development of the agricultural industry in a certain territory	Weight of quantity of agricultural producers in a given territory
P_2	Natural features of the rural territory	Set of the unique natural and geological objects located in a given territory
P_3	Cultural features of the estimated territory	Set of the most significant cultural and historical sights (as monuments or the museums) and/or their groups (as archaeological complexes, ancient settlements or barrows)
P_4	Uniqueness and identity of the people living in the rural territory and represents	Set of manifestations of unique ethnos (as interesting traditions, customs, or the way of life) and national crafts.
P_5	Organizational, economic and legal conditions of the organization and development of agrotourism in the rural territory.	Number of agrotourism projects operating on the territory: the more of them, the more favourable are the conditions for the development of agrotourism.

Source: Author's own elaboration.

sights, manifestations of unique ethnos and crafts and the number of agrotourism projects. Administrative data for the 2015-2016 year was obtained directly from the Omsk's 32 municipal districts. Statistical data concerning the number of agricultural producers caught and neutralized pollutants from stationary sources, provision of highways by local roads and the share of local roads with hard surface out of the total length of local roads, for the same year, was obtained from the Official State Statistics of the Omsk region. So, for addressing the complex idea of agrotourism provision in Omsk region, statistical data from 32 regional administrations were analysed, as abovementioned. These regional administrations were divided into 4 subgroups, having in attention the climatic zone: (i) northern zone, (ii) northern forest-steppe zone, (iii) southern forest-steppe zone and (iv) steppe zone. For each area, there is availability of data regarding natural and geological objects, national crafts and centres of national culture. Data on culturally historical and archaeological monuments is also available.

DATA ANALYSIS METHODOLOGY

At the heart of the assessment of tourism attractiveness of rural territories, there is a number of factors. The level of development of the agricultural industry, the availability of both unique natural and geological objects and cultural sights and the existence of exclusive ethnos and national crafts. Also, it is worth including a set of organizational, economic and legal conditions related with the conduction of agrotourism activities. The cumulative assessment of the described factors allows to judge the level of agrotourism potential and the main directions for its development.

Shumakova, Kosenchuk, Novikov, and Nardin (2015) proposed a comparative assessment of the potential for agrotourism development in rural areas. Their method includes a set of five indicators which define the potential opportunities for agrotourism development. The indicators, respective description and measurement are provided in Table 1.

The proposed method allows to:

$In = P_1 * \sum_{i=2}^{5} Pi$	[1]

1. Estimate, quantitatively, different aspects of agrotourism capacity of a territory;
2. Execute a complex assessment of the agrotourism capacity on rural territories calculating a single indicator, that combines the 5 indicators described;
3. Carry out a comparative assessment and the classification of rural territories regarding the potential opportunities for agrotourism development;
4. Define the priority directions for agrotourism development for specific rural territories.

The calculation of the single integral indicator (In) is made applying the following formula:

The first indicator (P_1) is chosen since defines the level of development of the agricultural industry of the full territory and, therefore, defines the ability of diversification of the business activity. This indicator multiplies the sum of all the other indicator that measure the existent measured number of objects, sights, ethnos and projects (the 4 other indicators).

However, the agrotourism capacity of rural territories is a difficult social and economic category to measure since it represents a set of the interacting factors promoting effective development of agrotourism (Table 2).

Depending on the conditions characterizing a rural territory and the factors influencing its development, the territory can be classified by the level of attractiveness of agrotourism development. The factors influencing the development of agrotourism capacity of a rural territory can, conditionally, be divided into two groups.

The first group includes the factors which are the basis for the rise of a purchasing desire of potential tourists regarding the supplied agrotourism products. These factors are the: (1) availability of the unique natural and geological objects located in the borders of the rural territory; (2) availability, in the rural territory, of unique ethnos and national crafts; (3) availability of cultural and historical attractions; (4) ecological wellbeing of the rural territory; and, (5) availability of agricultural production developed.

The second group includes the factors promoting a successful economic implementation of agrotourism projects in the rural territory or that show a possibility of a successful implementation. These factors are the: (1) development of transport infrastructure, considering the general security in highways with a hard surface; (2) existing agrotourism project, since these projects validate further possibilities of a successful implementation of agrotourism activities; and (3) developed of agricultural production, as the economic basis for implementation of agrotourism projects.

The assessment method for the agrotourism capacity of a region or rural territory has to consider factors of both groups, otherwise, the assessment will be unreasonably over- or underestimated what affects (equally) negatively the development of the tourist industry. The method includes the set of eight indicators presented in Table 3, taking in consideration, for the calculus, the defined assessment mark which scales ranges from 0 to 5 points. For determine the scoring, an expert group of 40 people was involved.

Table 2. Method's set of indicators definition, assessment mark and rating scale

Indicator	Measurement unit	Assessment mark	Rating scale
Availability of unique natural and geological objects	Number of objects/pieces located within the rural territory (measurement unit = piece)	B_1	• 0 units – 0 points • 1 unit – 1 point • 2 units – 2 points • 3 units – 3 points • 4 units – 4 points • 5 and more units – 5 points
Availability of cultural and historical sights		B_2	
Availability of unique ethnos and national crafts	Number of manifestations within the rural territory (measurement unit = piece)	B_3	
Availability of the existing agrotourism projects	Number of existing projects within a territory of the area (measurement unit = piece)	B_4	• 0 units – 0 points • 1-2 units – 1 point • 3-4 units – 2 points • 5-9 units – 3 points • 10-20 units – 4 points • 21 and more units – 5 points
Ecological wellbeing of the rural territory	Caught and neutralized pollutants from stationary source (measurement unit - %)	B_5	• To 10% – 0 points • 10,1–20% – 1 point • 20,1–40% – 2 points • 40,1–60% – 3 points • 60,1–80% – 4 points • more than 80% – 5 points
Development of transport infrastructure 1	Provision of highways by local roads (measurement unit - km on 1 sq.km)	B_6	• To 0,04 km – 0 points • 0,041-0,07 km – 1 point • 0,071-0,1 km – 2 points • 0,11-0,14 km – 3 points • 0,141-0,2 km – 4 points • more than 0,2 km – 5 points
Development of transport infrastructure 2	Share of local roads with hard surface out of the total length of local roads (measurement unit - %)	B_7	• To 10% - 0 points • 10,1-20% - 1 point • 20,1-40% - 2 points • 40,1-60% - 3 points • 60,1-80% - 4 points • more than 80% - 5 points

Source: Author's own elaboration.

These experts include representatives of regions, the active participants on agrotourism projects, and the staff of the public institutes which are engaged in the development of rural tourism in the regions.

Formula [2] presents the way the single integral final indicator (I) is calculated:where B_8 is the indicator characterizing the developed of agricultural industry in the rural territory. The final single indicator (I) is determined considering the specific weight of the agricultural producers located in a

$$I = B_8 * \sum_{i=1}^{7} B_i \qquad [2]$$

rural territory out of the total quantity observed for all rural territories for which the rating assessment of agrotourism potential is carried out.

As an instrument of quality standard control regarding the possibility of conducting agrotourism activities in the Omsk territory, a SWOT analysis has been developed.

ANALYSIS AND PRESENTATION OF RESULTS

Analysis Of The Actual State Of Agrotourism In The Region

As a basis for the development of rural tourism in the region are 305 large and medium-sized agricultural organizations, as well as 1,309 peasant farms. The region has over 153 active agrotourism projects, including recreation bases, guest rooms and houses. located in the countryside besides various tourist routes.

The region districts' division is extremely heterogeneous both on the level of development of agriculture and on climatic and cultural historically potential. For instance, the existent agrotourism project are located in the North of the region even if they are distributed by municipal districts and climatic zones. Moreover, the greatest number of agrotourism objects (64) is concentrated in regions of the Northern forest-steppe zone of the Omsk region. Unique natural and geological objects, which are located on the region, no more than 15 out of 77 are involved in tourist activity. In the territory on analysis are implemented 31 tourist routes from which only 6 routes relate to local sociocultural ethnos and national crafts.

Moreover, more than 120 nationalities live in the region. The most numerous are the Russians, Ukrainians, Belarusians, Germans, Kazakhs, Tatars and Latvians. The majority lives densely in national villages preserving the cultural and historical features which can act as objects when developing new tourist routes.

Historical specialization in agriculture and the geographical location of Omsk region determines a significant number of specific features that can be divided in opportunities and threats due to the General macroeconomic trends observed for the Russian Federation. Based on the SWOT analysis presented in Table 3 several conclusions, regarding rural tourism, can be presented for the Omsk region. The main competitive advantages of the Omsk region, which should be strengthened and developed, are the availability of public and commercial organizations on the territory, as well as the provision of natural and cultural objects. Even if Omsk offers a set of public and commercial organizations, to implement the opportunities in the shortest possible time, it is necessary to attract private investments and the ultimate public. The Omsk's weaknesses impact will be reduced attracting investment funds to upgrade the infrastructure now existent in rural areas.

The Integral Indicator Of Agrotourism Potential In Rural Areas: Results

The calculus of the single integral indicator (In), following the application of formula [1] allow to present the results that are possible to observe in Table 4. In the table is also possible also to check the results obtained for the five indicators Shumakova et al. (2015) propose to elaborate the comparative assessment of the potential for agrotourism development in rural areas. To better identify each municipal district a number (from 1 to 32) has been attributed to each one.

Table 3. Omsk's rural tourism SWOT analysis

Strengths	**Weaknesses**
1. High-level agricultural capacity of the territory 2. High-level natural and recreational capacity of the territory 3. Availability of cultural and historical monuments 4. Availability of public and commercial organizations which can promote tourism development in the rural territory 5. Country's diversified orientation and personal subsidiary farms	1. Low-level of development of tourist infrastructures in the rural territory 2. Weak system of promotion of tourist's products both in domestic and international tourist markets 3. Lack of recognition and attractiveness of the regions' image (lack of a recognizable brand) 4. Lack of statistical data for the sector which may provide information and, therefore, managerial support for the development of the tourism industry 5. Imperfection of the legislation connected with questions of allocation of the land plots for tourist and recreational needs 6. Lack of special programmes for supporting the rural inhabitants, namely, individuals interested to begin a business activity in the tourism field
Opportunities	**Threats**
1. Income growth in the region, in general, and of local inhabitants, in particular 2. Creation of additional jobs 3. Development of small entrepreneurial activities in the villages 4. Recovery of a village social infrastructure 5. Engagement of foreign tourists	1. Imperfections of the tourist industry regulatory framework 2. Decrease in demand of the solvent population owing to reduction of profitability of primary branches of economy 3. Risk of a reducing on tourist flows 4. Russian Federation's social, economic and political destabilization 5. Ecological deterioration in the country

Source: Author's own elaboration.

The evaluation of agrotourism capacity in Omsk rural territories revealed an uneven distribution of opportunities for the development of agritourism in the four main areas of the Omsk region and the specific municipal districts that composed them.

The area with the highest agritourism development potential is the so-called Southern forest-steppe zone. The single integral indicator is the biggest one ($In = 28.04$). This value is explained by the existence, in the municipal districts that compose the area, of exclusive natural and cultural objects (the P2 indicator), and the level of agriculture development – in this specific area, 34% of all agricultural producers in the Omsk region are located (see the value of the P1 indicator in the table). Even if it is in the Steppe zone of the Omsk region that 47.0% of all Omsk's agricultural producers are concentrated, the full potential agricultural development potential is just 20,14 (the single integral indicator for the Steppe zone). This last value, that lowers the potential of the Steppe zone regarding the Southern forest-steppe zone, is connected with the insignificant concentration of natural (P2 indicator) and cultural (P3 indicator) objects that may attract tourists. The two other areas in the Omsk region – the Northern and Northern forest-steppe zones – present similar results for the P2 (natural), P3 (cultural) and P4 (unique ethnos and national crafts) indicators. However, the potential of development of agritourism (the P5 indicator) in the Northern area is significantly lower (27.0) than in the Northern forest-steppe zone (64.0).

Such difference is explained by the extremely low level of agricultural production development in these areas on which just only 4% and 15% (Northern and Northern forest-steppe zones, respectively) of the Omsk region producer are located. Moreover, the value found for the Northern forest-steppe zone, regarding the agrotourism projects implemented, measured by the P5 indicator, is the result of a better organization of economic and legal conditions for the development of agrotourism projects. Figure 3, presents a visual interpretation of the results above analysed and allow our eyes to understand better the level of agrotourism potential in each municipal district and each aggregate defined area.

Table 4. Results for the municipal districts' individual comparative indicators and for the single integral indicator for each Omsk region area

Areas		Northern forest-steppe zone									
		1	2	3	4	5	6	7	8	9	
Municipal Districts		Bolsherechensky	Gorkovsky	Kolossovsky	Krutinsky	Muromtsevsky	Nazyvayevsky	Nizhneomsky	Sargatsky	Tyukalinsky	**Total**
Individual indicators	P1	2.0	2.0	1.0	1.0	2.0	1.0	2.0	2.0	2.0	**15.0**
	P2	2.0	3.0	1.0	4.0	8.0	2.0	1.0	2.0	2.0	**25.0**
	P3	3.0	0.0	2.0	2.0	3.0	2.0	3.0	2.0	1.0	**18.0**
	P4	1.0	0.0	1.0	0.0	2.0	0.0	0.0	0.0	0.0	**4.0**
	P5	8.0	6.0	6.0	6.0	15.0	4.0	1.0	10.0	8.0	**64.0**
Integral indicator (In)		0.26	0.16	0.12	0.11	0.54	0.06	0.12	0.22	0.25	**16.44**

Areas		Southern forest-steppe zone								
		10	11	12	13	14	15	16	17	
Municipal Districts		Azov	Isilkulsky	Kalachinsky	Kormilovsky	Lubin	Maryanovsky	Moskalensky	Omsky	**Total**
Individual indicators	P1	3.0	4.0	10.0	4.0	3.0	3.0	4.0	4.0	**34.0**
	P2	1.0	2.0	3.0	0.0	4.0	0.0	2.0	4.0	**16.0**
	P3	1.0	2.0	3.0	2.0	1.0	2.0	2.0	3.0	**16.0**
	P4	3.0	1.0	0.0	0.0	0.0	0.0	0.0	0.0	**4.0**
	P5	4.0	2.0	1.0	4.0	4.0	2.0	1.0	28.0	**46.0**
Integral indicator (In)		0.26	0.29	0.71	0.23	0.27	0.11	0.2	1.3	**28.04**

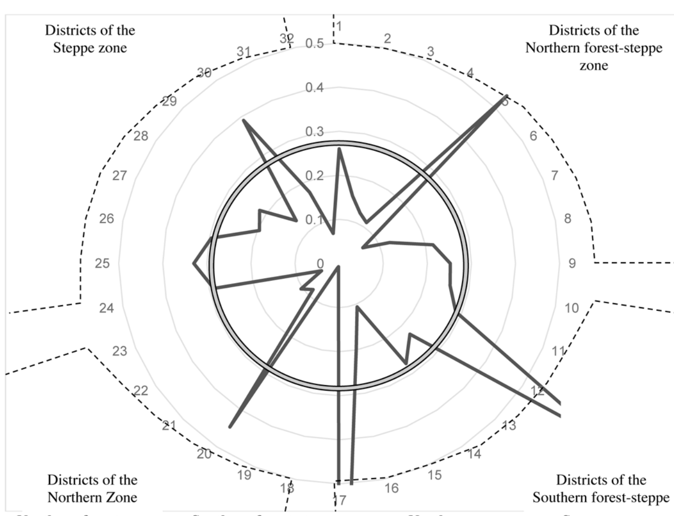
Areas		Northern zone						
		18	19	20	21	22	23	
Municipal Districts		Ust-Ishimsky	Tevrizsky	Tarsky	Bolsheukovsky	Znamensky	Sedelnikovsky	**Total**
Individual indicators	P1	0.0	0.0	2.0	1.0	1.0	1.0	**4.0**
	P2	1.0	3.0	5.0	5.0	3.0	2.0	**19.0**
	P3	3.0	5.0	2.0	4.0	4.0	3.0	**21.0**
	P4	1.0	1.0	1.0	1.0	2.0	1.0	**7.0**
	P5	1.0	1.0	16.0	5.0	3.0	1.0	**27.0**
Integral indicator (In)		0.01	0.01	0.45	0.08	0.1	0.04	**3.07**

Areas		Steppe zone									
		24	25	26	27	28	29	30	31	32	
Municipal Districts		Okoneshnikovsky	Cherlaksky	Novovarshavsky	Taurian	Poltava district	Russko-Polyansky	Odessa	Sherbakulsky	Pavlohradsky	**Total**
Individual indicators	P1	7.0	5.0	3.0	5.0	4.0	5.0	6.0	9.0	3.0	**47.0**
	P2	2.0	4.0	4.0	1.0	2.0	0.0	0.0	0.0	0.0	**13.0**
	P3	1.0	2.0	2.0	2.0	1.0	2.0	1.0	1.0	1.0	**13.0**
	P4	0.0	0.0	0.0	0.0	0.0	0.0	1.0	0.0	0.0	**1.0**
	P5	1.0	1.0	3.0	1.0	2.0	1.0	5.0	1.0	1.0	**16.0**
Integral indicator (In)		0.29	0.33	0.3	0.2	0.22	0.14	0.39	0.17	0.07	**20.14**

Source: Author's own elaboration

In the Northern forest-steppe zone, which comprises 9 municipal districts, the municipal districts of

Figure 3. Integral assessment for the development of agrotourism potential by municipal districts and big areas of the Omsk region
Source: Author's own elaboration.



Northern forest-steppe	Southern forest-steppe	Northern	Steppe zone
1 Bolsherechensky	10 Azovsky	18 Ust-Ishimsky	24 Okoneshnikovsky
2 Gorkovsky	11 Isilkulsky	19 Tevrizsky	25 Cherlaksky
3 Kolossovsky	12 Kalachinsky	20 Tarsky	26 Novovarshavsky
4 Krutinsky	13 Kormilovsky	21 Bolsheukovsky	27 Tavrichesky
5 Muromtsevsky	14 Lubinsky	22 Znamensky	28 Poltavsky
6 Nazyvayevsky	15 Maryanovsky	23 Sedelnikovsky	29 Russko-Polyansky
7 Nizhneomsky	16 Moskalensky		30 Odessky
8 Sargatsky	17 Omsky		31 Sherbakulsky
9 Tyukalinsky			32 Pavlohradsky

Muromtsevsky (identified with the number 5 in the figure) and Bolsherechensky (identified with the number 1 in the figure) are noticeably distinct. The Muromtsevsky municipal district, due to its significant exclusive number of natural and historical objects identified is far particular within Omsk. The municipal district of Bolsherechensky has a rural zoo (a unique type of zoo in the Russian Federation) and hosts the well-known historical and cultural complex "Starie Vremena Sibirskie". In the Southern forest-steppe area (which includes just 8 districts) the municipal district with the highest potential is by far the Kalachinsky municipal district (number 12 in the set of districts) – its unique natural and cultural objects and the location of 10% of all Omsk's agricultural producers, offering opportunities for the development of agrotourism activities, explain such distinctive potential comparing with the municipal districts in the same area. In the Northern zone, the area with less municipal district (just 6) the leader, in terms of the agrotourism potential, is the district number 20 – the Tarsky district in which administrative centre a significant amount of cultural sights offer an exceptional relationship among different historical eras starting with the origin and development of Siberia, passing by the history of the Siberian path – the so-called Decembrists were sent into exile there - and finishing with cultural objects representing modern times. In this municipal district is also located the Northern drama theatre which performances are put on stages all over the largest Russian cities. The special features of this district, however, do not compensate the lack of agritourism potential in the other districts in the area, and therefore all the zone performs worse when compare with the other three considered zones. The last area in this analysis the Steppe zone, This are that includes 9 municipal districts is the most homogeneous one, with no district presenting particular features that distinguishes it from others, In the Steppe zone, the possible runners on the agrotourism development are the districts of Odessky (district number 30) and Cherlaksky (district number 25) districts in which the developed agriculture is combined with natural and cultural sights.

Rating Assessment of the Potential of Rural Areas: Results

As explained in the methodology, a mark assessment by experts of the indicators characterizing a region agrotourism potential has been carried out. This method allows to calculate a comprehensive indicator for the existence of potentialities for the development of agrotourism in the area. The indicator additionally allows to compare different areas among themselves. Considering the percentage share of agricultural producers distributed across the territory in study has been calculated the share of producers in each municipal district and therefore a single integral indicator of attractiveness has been computed. Value of an integral indicator indicated. Table 5 presents the results of such mark assessment, for the single municipal districts and for the areas they compose within the Omsk region.

A high rating assessment of the first two areas presented in Table 2 of the methodology section (availability of unique natural and geological objects - called the B1 mark - and availability of cultural and historical sights – the B2 mark assessment) is, in general, a consequence of both the level of concentration of agricultural producers (the share of producers in an given area) and the high level of development of transport infrastructures (B6 and B7 assessment marks). So, a priority solution to enhance the development of agritourism in the previous mentioned areas relies on the organization of tourist tours involving the agricultural companies. The priority direction for the agrotourism development in the areas considered regards the organization of tours on agricultural enterprises with the purpose of acquaintance of city tourists with features of agrarian production. For example, for the Kalachinsky municipal district the organization of tourist routes, with the inclusion of both unique natural and geological objects and cultural and historical sights, can become one of the directions of agrotourism development. Another

Table 5. Rating assessment of the municipal districts and aggregate areas in the Omsk region regarding the attractiveness level for agrotourism development

Area		Northern forest-steppe zone									Southern forest-steppe zone								Northern zone						Steppe zone								
		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32
Municipal districts		Kalachinsky	Sherbakulsky	Omskiy	Okoneshnikovsky	Tavricheskiy	Isilkulsky	Odesskiy	Cherlaksky	Kormilovsky	Novovarshavsky	Lubinsky	Poltavsky	Azovskiy	Moskalensky	Russkopolyansky	Muromcevskiy	Tyukalinsky	Bolsherechensky	Tarsky	Pavlohradsky	Nizhneomsky	Maryanovsky	Sargatsky	Gorkovsky	Znamensky	Kolosovsky	Krutinsky	Bolsheukovsky	Nazyvayevsky	Sedelnikovsky	Tevrizsky	Ust-Ishimsky
Mark assessment of the indicators characterizing agrotourism potential	B_1	3	0	4	2	1	2	0	4	0	4	4	2	1	2	0	5	2	2	5	0	1	0	2	3	3	1	4	5	2	2	3	1
	B_2	3	1	3	1	2	2	1	2	2	2	1	1	1	2	2	3	1	3	2	1	3	2	2	0	4	2	2	4	2	3	5	3
	B_3	0	0	0	0	0	1	1	0	0	0	0	0	3	0	0	2	0	1	1	0	0	0	0	0	2	1	0	1	0	1	1	1
	B_4	0	0	5	0	0	0	3	0	2	2	2	0	2	0	0	4	3	3	4	0	0	0	4	3	2	3	3	3	2	0	0	0
	B_5	3	2	2	4	4	2	0	2	5	1	2	2	1	0	3	0	4	0	1	2	2	0	3	0	3	0	0	2	1	0	0	0
	B_6	4	4	5	3	3	4	2	2	3	3	4	3	5	4	1	1	1	2	1	2	2	5	2	3	2	1	1	0	0	0	1	0
	B_7	3	3	4	0	4	4	4	3	4	3	3	3	3	3	3	2	3	4	1	3	3	3	3	2	4	2	1	3	2	4	1	0
Share of producers	B_8	10.1	8.7	3.7	7.2	4.9	4.1	5.6	4.7	3.8	3.3	3	4.3	2.9	4	4.6	1.9	2.3	1.9	1.9	3.5	2.5	2.7	1.5	1.7	0.9	1.2	0.9	0.6	0.8	0.6	0.1	0.1
Integral indicator of attractiveness (I)		1.62	0.87	0.86	0.73	0.69	0.61	0.61	0.61	0.61	0.49	0.49	0.48	0.46	0.44	0.41	0.33	0.32	0.28	0.28	0.28	0.27	0.27	0.25	0.19	0.17	0.12	0.10	0.10	0.07	0.06	0.01	0.01

Source: Author's own elaboration

Table 6. Classification groups, regarding the characteristics of rural territories, with different alternative potential directions of agrotourism development

Groups	Indicator share of group score (%)								The number of areas in groups
	Unique natural and geological objects	Cultural and historical sights	Unique ethnos and national crafts	Operating agrotourism projects	Ecological wellbeing	General extent of highways	Extent of highways with a hard surface	Share of agricultural . producers	
Group 1	22,0	19,0	5,0	18,0	10,0	11,0	15,0	12,0	6
Group 2	20.2	13.2	1.6	12.4	17.8	16.3	18.6	28.8	9
Group 3	12.3	18.4	7,0	12.3	7.9	17.5	24.6	31.2	10
Group 4	10.8	14.9	1.4	2.7	12.2	29.7	28.4	28.1	7

Source: Author's own elaboration

example regards the municipal district of Ust-Ishimsky which ranks last in the assessment. In this case, the priority directions for achieving agrotourism development should be connected with the development of tourist routes on the basis of tourists' visits to cultural and historical sights. At the same time, one of the main problems which the promoter of agrotourism projects should solve, in a strong cooperation with the public power, is the low transport availability due to the lack of developed transport infrastructures.

The here offered empirical method allowed to carry out the classification of rural territories on which depends the potential directions of agrotourism development. The rural territories which received the higher mark assessment received a "5" to "4" mark assessment. The second highest assessment received a mark assessment of "3". The fourth group included the rural territories which received marks between

"2" and "1". The main characteristics of the selected classification groups, presented as a share of the group score, of rural territories are presented in Table 6

Four groups are identified. Group 1 is composed by the lower number of municipal districts (6 districts). The group is characterized by a low level of development on transport infrastructures (just 11% and 15% for the general extent of highways and the extent of highways with a hard surface, respectively) and both the biggest share of unique natural and geological objects (22%) and cultural and historical sights (19%). This group is also defined by having the biggest share of operating agrotourism projects (18%). However, this group presents a fragility. It is the group with the lowest share of agricultural producers concentrated in the municipal districts that compose the group (just 12%.). Regarding all the above-mentioned features the priority direction for the agrotourism development would be the organization of tourist routes orientated to visit unique nature and history objects.

Group 2, in bigger than the first one and includes 9 municipal districts where 28,8% of agricultural producer are located (the second biggest share very similar with the share of agricultural producers in group 4). The group is characterized by a biggest level of developed of transport infrastructure (at least bigger than what happened in the first group), a better ecological wellbeing (17.8% which is the biggest share among all the groups) and the existence of a significant amount of unique natural and geological objects (22.2%).

Most municipal districts compose group 3 (10 districts). This may be the reason why the biggest share of agricultural producers (31.2%) is located in the group. It is also characterized by the high level of development of transport infrastructures (17.5 and 24.6% for the general extent of highways and the extent of highways with a hard surface, respectively) and by the biggest share of existent cultural and historical sights, national crafts and unique ethnos (18.4 and 7.0, respectively).

The fourth classification group (with 7 municipal districts) is the basis for 28% of agricultural producers. The group is characterized by the low level of concentration of unique natural objects and cultural and historical sights (10.8 and 14.9%, respectively) and, also, by the almost total absence of active agrotourism projects (just present a share of 2.7% on this item). However, the municipal districts on it present the most developed transport infrastructures. So, the priority direction of agrotourism development for the districts within this group is the cognitive agricultural tourism with the inclusion in tourist routes of visits to agricultural production facilities.

The classification provided in Table 6 can, in the long run, become a basis for the development of models of agrotourism development on the basis of specialization of certain rural territories. Simultaneously, time efficiency should be considered regarding: (i) efficiency for pioneers of tourist projects, (ii) efficiency on budgets at all levels of the public administration, (iii) efficiency for inhabitants of rural territories, and (iv) efficiency for tourists. Availability of agrotourism potential and the existence of conditions for its implementation on each rural territory should be estimated from the economic point of view. In this case, it is proved that is possible to implement a systematic empirical approach to sustainable development of rural territories.

FINAL REMARKS

On the basis of the research results presented, it is possible to draw the conclusion that there is a close connection between agrotourism, agricultural activities and sustainable development of rural territories. The applied assessment method allowed the classifying of rural territories by their level of agrotourism potential and to define the main benefits of the territory based on which it is necessary to create the perspective directions of agrotourism development. The method allowed to reveal in each climatic zone (the factor that permitted the division of the Omsk region in four main areas considered) the leading areas regarding the potential opportunities for the agrotourism development and to define the set of conditions, which provided their leadership. The method of rating assessment of the agrotourism capacity of rural territories allowed carrying out their classification depending on the potential directions of agritourism development which should be considered as priority. The provided classification, in the long run, can become a basis for the development of a model for the organization of a regional agrotourism cluster based on specialization of certain rural territories on certain directions of agrotourism development.

Rural tourism, in particular, the agritourism gives to tourists the chance to approach the nature, to relax having a rest and gain strength. Besides, allows to satisfy specific hobbies as studying historical, cultural, ethnographic and, architectural heritage, get acquaintance with the customs and crafts typical the region, namely with local national clothes, kitchen, folklore, local languages or dialects. It allows, also to make amazing amateur photos or/and collecting specific herbs and minerals.

However, despite the available positive examples of development of agrotourism in the Russian Federation, it is necessary to state the practical lack of normative legal documents which are especially regulating agrotourism activity. In them, it is not specified the concept of “agrotourism” or other commonly-used similar terms like “rural tourism”, “ecotourism” or “green tourism”. It should be noted that it is not possible to transfer the standards applied in the field of recreational and hotel business mechanically to a small family hotel economy located in a rural due to several specificities. Practice shows that in those rural territories where there is agricultural production, there are premises for their sustainable development. Implementations of these premises can prevent social and engineering infrastructure problems, low economic and employment activity of residents and a low level of its self-organization. In such situation, agrotourism activity, with the corresponding support of state bodies, can be a source of additional financial resources and an incentive to develop the entrepreneurial initiative of rural residents.

Thus, a systematization of the concept and content of agrotourism activity, and the understanding of its strategic objectives and tasks will allow to reveal the rural territories in which it is reasonable to develop specific types and solutions presented by agrotourism. Additionally, such systematization allows also to develop approaches that the government policies may apply to aim at the sustainable development of rural territories.

Having in consideration the results presented, the Omsk region has all the necessary features for a successful development of agrotourism activities. The development of agrotourism should not be enhanced using just one option (or model) but should include several alternative measures. For example, the following alternative measures could be outlook:

1. Creation of regional agrotourism networks through the development of small family and individual agro travel businesses based on the existing tourist’s resources. For example, the establishment of a small family hotel economy and agrotourism infrastructures (including the different agrotourism objects and types of business connected with it);
2. Reconstruction of the sociocultural environment of the historical settlements - “the historical village”, “the national village” or other type of settlement - and of other historical objects (noble and merchant estates, monasteries, etc.);

3. Creation of large and average specialized agrotourism objects oriented for the acceptance of tourists and their wellbeing. It can be the specialized centres (sports, cultural or culinary centres, for example), stylized "agrotourism villages" or "fishing"/"hunting villages";
4. Creation of public and private agricultural parks as multipurpose large complexes for exhibitions, advertising, cultural, research and production events, for instance, with the corresponding infrastructures.

A a sustainable development of tourist activities in Omsk rural territories will: (i) provide a high level of live standards for the residents in rural areas and the increase of profit within the organizations of agroindustrial complexes and organizations of culture and rest; (ii) preserve natural, architectural, historical and cultural regional objects; and, (iii) ensure the needs of the population that continue to live in rural areas.

The economic block of the development mechanism of agrotourism includes the following elements: (i) assessment of the economic potential, i.e, the analysis of the available materials and economic resources required in the for creation of new tourist products; (ii) measurement of the public policy support, including preferential levels of taxation, including reduction of regional tax rates, a simplified tax system, grant supports and subsidies, targeting entrepreneurs and organizations occupied with providing agrotourism services; (iii) implementation of a credit policy, with a state support, concerning with the development of products and objects that will attract new tourist publics; (iv) attraction of investment, since the development of agrotourism creates favourable conditions for the attraction of private investor at the expense of advantageous conditions, cost reduction and other economic benefits; (v) market regulation to increase the satisfaction of consumers and therefore the demand of tourist products; (vi) development of external economic relations since not only local entrepreneurs and organizations should be active participants on the regional development of agrotourism.

The effective interaction of organizational and economic blocks allows the development of agrotourism to resist to negative factors influence. The agrotourism development as a sector on the regional tourism industry will demand the increment of partnership among public power, private businesses, local communities and a wide range of non-governmental organizations.

Further researches in the field may include the development of models of agrotourism functioning, of agrotourism routes in the territories of the Omsk region, and similar regions, and the calculation of economic indicators to support the development of agrotourism activity.

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Chapter 16
How Can Marketing Intelligence Support Tourism Companies to Increase Their Competitiveness?

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ABSTRACT

In a constant evolution of the global economic sector over the past 50 years, conditions to create more job opportunities and offer business services have remained timeless in many respects but subject to significant change as well. Tourism as an international industry and as the biggest provider of jobs on the planet boasts a greater array of heterogeneous stakeholders than many other industries. It is necessary to utilize all available information resources to make decisions, especially in the age of agglomerate economies. And further attention should be given towards understanding how marketing intelligence can support tourism companies to increase their competitiveness. This chapter was developed in two phases: (1) identification and (2) analysis. A literature review was made through the electronic database Scopus.

INTRODUCTION

In a constant evolution of the global economic sector over the past fifty years, conditions to create more job opportunities and offer business services have remained timeless in many respects but subject to significant change as well. Tourism as an international industry and as the biggest provider of jobs on the planet boasts a greater array of heterogeneous stakeholders than many other industries. Tourism has been a phenomenon characterized by balance or harmonious relationships between organizations and tourists. Basically, it is considered as a group of people and places providing touristic services. A consumer is changing extensively, making more inquiries, creating or joining social media networks, and

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writing reviews. It is time to understand the new consumerism in tourism. Recently, they are creating a specialized technologically sophisticated market.

Technological progress and tourism have been going hand in hand for many years. Information communication technologies have been transforming tourism at the global level. It is time to develop business practices and strategies to be more competitive in a global market, and marketing intelligence can play a significant role in this respect. Furthermore, in order to operate globally, it is necessary to utilize all available information resources to make decisions, especially in the age of agglomerate economies. And further attention should be towards understanding *how marketing intelligence can support tourism companies to increase their competitiveness.*

This chapter is structured as follows: the first section presents a broad view of the concept of the tourism sector in the current global economic scenario. The second addresses competitiveness. The third explores marketing intelligence. The fourth section presents the research method. The fifth highlights the findings developed in this study. And the last section discusses the results and conclusion.

TOURISM APPROACHES

Since the launch of commercial internet applications in the early 1990s, many researchers have noted the potential of the World Wide Web, especially in business. The internet is immensely important for business in any economic sector. In the 20th century, globalization of capitalism, movement of populations, and advances in transportation and communication technology have helped to develop tourism into one of the world's largest industries (Choi & Sirakaya, 2006).

According to Law, Qi, and Buhalis (2010), the internet is responsible for the rapid development of information, changing the approach in the tourism industry and serving as an effective marketing tool in support of future implications about present decisions. In Ye et al. (2011) study, we can observe an example of some decisions' impacts, while tourism has brought in economic benefits, it has significantly contributed to environmental degradation, negative social and cultural impacts, and habitat fragmentation. Sheppard et al. (2010) confirm in their research that major impacts come from numerous industrial, infrastructure-based, residential, and tourism development activities, uniting synergistically in some cases to further deteriorate habitats.

Consequentially, Choi and Sirakaya (2006) demonstrated that decision makers became increasingly aware of the drawbacks of mass tourism, so they searched for alternate tourism planning, management, and development options. The highly competitive environment of the industry has forced tourism firms to probe for ways to enhance their competitive advantage and create alternatives to be more competitive (X. Zhang, Song, & Huang, 2009). Another alternative to prevalent tourism is possible to note in Orams (1995) findings. He identifies ecotourism as a probably an equally significant alternative to conventional tourism due to the widespread and growing interest in the natural environment and a corresponding recognition of the importance of conserving natural environmental quality. The positive images associated with the term 'eco', for example, in ecology, ecosystem, ecosphere and eco-sensitive have combined to create a name that expresses a concept which has become popular as tourism destinations. Urban tourism is more of a one destination alternative as observed by Ashworth and Page (2011) when they demonstrated that to begin to understand tourism in the city we must embrace urban studies and their theoretical critiques.

According to Lu et al. (2015), all tourist information is made available in a global network to provide access to several choices and destinations. By using the internet, it is possible to provide suggestions and recommendations to tourists regarding transportation, restaurants, and accommodation. Therefore, various recommendation techniques are applied in tourism depending on the complexity degree of customers' requirements. Leung, Law, van Hoof, and Buhalis (2013) observed distinct approaches on social media that use the internet to evolve a broadcasting to a participatory platform that allows people to become the "media" themselves for sharing information about tourism. Zeng and Gerritsen (2014) conducted a research about social media as one of the most powerful online networking tools and which has integrated both social and economic life in the real world. Their findings contribute to understanding that the use of the internet and other information communication technologies is leading to a new era for the global economy. Social media continue to grow and increasingly influence many social and economic aspects of the tourism and hospitality industries.

Consumers typically enjoy interacting with the web to play web-based games, e-mail, chat, etc… . Therefore, interactive communication behavior can be viewed as a sort of entertainment. And ultimately, profiling will lead to better personalization, customization, and interaction between consumers and tourism organizations (Law et al., 2010). However, Ye et al. (2011) argue that despite the wide adoption of social media by both tourism consumers and suppliers in recent years, the successful practice of manipulating and managing social media still remains largely unfamiliar to practitioners and scholars.

The findings of Novelli, Schmitz, and Spencer (2006) take into consideration the globalized environment. And that there is a growing interest in understanding the way businesses of the masses and agglomerate economies are formed. Special attention is given to how increased synergies and productivity, knowledge transfer, and production of innovative services could enhance employment and marketing. Another case was studied by Weber (2001) where it is necessary to clearly differentiate between market segments since marketing intelligence devised to appeal to one segment would not necessarily address the needs of the other. Ritchie and Ritchie (2002) proposed a strategy that offered direction regarding both the type of information required to conduct effective destination marketing and, equally important, how this information could be obtained in a cost-effective manner. They created a framework that can serve as a useful model for other jurisdictions.

According to Benckendorff (2006), one explanation for the lack of attraction planning research in tourism literature may well be due to the scale or size of tourism businesses studied by researchers. Strategic planning research has traditionally focused on large corporations, and the models, prescriptions and constructs observed may not be relevant to smaller firms, such as those commonly found in the entertainment sector.

In a traditional approach, Pasichnyk and Artemenko (2015) elaborate that information technologies in the tourism industry have maintained and implemented a significant number of different processes and systems. This led to the rapid development of various electronic information tourist guides, on-line reservation systems, and so on. In addition, tourism businesses and tourism market players interested in direct sales of their products to tourists actively develop e-marketing tools and information support. Neidhardt and Werthner (2018) argue that IT and tourism are still hot topics. The web is not only reflecting this world, it is obviously transforming it, where it is increasingly difficult to distinguish between the actual and the virtual. It acts both as an enabler and driver of new technical, economic, and societal developments. With recent achievements in areas such as machine learning, Internet of Things or artificial intelligence (or rather intelligence assistance - a probably more appropriate term), we witness the power of computer science.

However, many machine learning techniques are applied in the tourism sector. In their study, C. Zhang and Huang (2015) address the problems and solutions upon using the double-learning framework to predict tourist motives from tourist external and internal features data collected through an on-site survey. Results indicate that, based on the two-phase learning process, we can predict tourists' motives accurately as well as extract meaningful insights which are useful for targeted marketing strategies development from the real-world data.

COMPETITIVENESS CONCEPTIONS

Ever since the dawn of humanity, it is part of the human nature to try and be successful. People have always been interested in having advantage or profit over competitors. Throughout time and based on social development, this behavior is still pronounced and we call it competitiveness or competitive advantage. From a traditional approach, competitiveness is considered at two levels: microeconomic (firm level) and macroeconomic (national level). At the company level, competitiveness can be interpreted as the strategic decision-making ability in the business and the rivalry among companies based on factors such as technology, innovation, skills, knowledge, human capital, etc… . At the market level, national competitiveness refers to the ability to adapt policies that directly affect companies in international competition, and to raise the standard of living of its citizens (Stojanovska et al., 2017).

Khan et al. (2017) reveal that the theory of competitive advantage rebuilds, more than a hundred years later, the theory of comparative advantage whose emphasis was on the production of goods with comparatively low manufacturing and opportunity costs observed in countries such as Japan, Hong Kong, and South Korea. All emphasis on competitiveness was to spread regional economic development in light of interregional disparities in income and employment created by economic crises. Other factors like well-being, health, air quality, and safety were considered in the impact.

Regional competitiveness refers to the common features that characterize all companies in a region, including institutions, infrastructure, education, workforce skills, technology, and innovation, that is, any context that can help a company operate in a business environment conducive to its development or, on the contrary, in a hostile one. Interest in measuring regional competitiveness is due to the benefits it can bring along: it provides an assessment of the local economic environment, identifies weaknesses in the local economy, encourages a long-term perspective on the economic development process, and leads to new marketing programs for the local market and the region (Clipa & Ifrim, 2016).

According to Terziu (2014), the best global experience recommends new forms of regional development as a type of cluster, by concentrating on similar groups in the region, since many companies have similar problems that may be related to the competitiveness of their products, market opportunities, costs of sources, quality and patterns according to market demand, etc… In short, the question is to identify opportunities for cooperation.

The most competitive regions become leaders in the global economy. They form coalitions and strong relationships with investors, strengthening their competitiveness. These regions have grown dynamically and sustainably, and present high standards of living that in turn attract highly qualified specialists from around the world, which leads to the accumulation of significant intellectual capital. Meanwhile, regions that are less competitive struggle to become suppliers of raw materials and centers of product sales for leading regions. Regions that do not offer opportunities for development stagnate and lose their competitiveness (Zinovyeva et al., 2016).

Business sustained competitiveness differs from sustainability (Özyurt & Kantarci, 2017), as it addresses sustainability as a topic present in companies since the announcement of Our Common Future, known as the Brundtland Report on Environment and Sustainable Development. The present definition of sustainable development highlights a process to meet present needs without compromising future generations, which requires the cooperation of all stakeholders to improve people's quality of life, as well as the social and natural environment.

One way to understand the sustainable logic of competitiveness can be observed in the study by Aldy (2017) on the possibility of reducing carbon intensity in energy generation, changing the focus from investments in higher costs technologies, such as electricity. By defining a carbon price for fossil fuels throughout the economy, energy prices will increase. The costs of these climate policies can negatively affect domestic firms, especially if their competitors do not face a comparable regulation or taxation for emissions. In particular, the energy-intensive manufacturing industries expressed concern that domestic policy for climate change could impose adverse competitiveness effects because it would raise production costs in comparison to their foreign competitors.

One of the relevant factors of regional competitiveness is the development of a global business strategy as highlighted by Peña-Vinces et al. (2017) in their competitiveness analysis of SMEs (small and medium-sized enterprises). The research revealed that global strategy is the determining factor of competitive advantage and international competitiveness, and that it is necessary to look for competitive environments abroad since companies gain more confidence than if they remain in the regional environment, relying on a national strategy of differentiation and adaptation.

Another determinant factor of international competitiveness is the intensive use of knowledge as addressed by Ochel (2002) in his study on business services that contribute significantly to economic growth and job creation in all developed economies. Services have increasingly become more international. For instance, services provided by architects and engineers, computer companies, law firms, accountants, business consultants, and advertising agents can cross their home country boundaries. Economists have paid close attention to the structural changes that led to a service-oriented economy, but they still largely ignore the internationalization process.

Competitiveness itself is a concept that still needs a clear definition and it is still not fully understood (Rentschler & Kornejew, 2017). These authors explain that there is no single way of measuring competitiveness, and for this reason they propose to evaluate the impact of energy prices on companies through an indicator defined as a "symptom" of competitiveness which measures price variation known as "ability to sell" or "ability to earn."

In the approach proposed by Díaz-Chao et al. (2016), the competitiveness of European regions falls into three types of dynamic agglomeration economies. First, regions as production sites, with a competitive advantage based on the availability and price of inputs. Second, regions as sources of increasing returns, with a competitive advantage based on labor division and market size. Third, regions as knowledge centers, with a competitive advantage based on the quality of human resources, access to international markets, availability of business services, and on its attractiveness as a cultural and knowledge center.

MARKETING INTELLIGENCE AS A STRATEGY

Marketing intelligence can be considered as a part of a marketing strategy to enhance the competitive advantage of the company and to support future decisions. It is a specific topic in marketing used by researchers and professionals to identify different ways to use it in the business world. According to Kiani, Pashootanizadeh, and Ansari (2018), their findings indicated that the risk-taking ability has no significant direct influence on the marketing user loyalty, while competitive advantage directly affects it. However, marketing intelligence and risk-taking ability can influence user loyalty if mediated through competitive advantage. Another application for marketing intelligence in business intelligence and analytics in social media marketing (Hajli & Laroche, 2019) analyzed and visualized either for creating marketing insights and knowledge to complement the insufficiency of intrinsic organizational knowledge or as a roadmap for improving service quality and firm performance.

Helm, Krinner, and Schmalfuß (2014) found that a systematic marketing intelligence process should be based on the resource and market view of the strategy as well as on the market orientation construct. When implementing marketing intelligence, the integration of the sales force within the whole process is the crucial lever for an industrial company. The formalization of the process is necessary to ensure its continuity and acceptance; however, the varying intensity allows the necessary flexibility of the process.

Fan, Lau, and Zhao (2015) explain that marketing intelligence has traditionally relied on market surveys to understand consumer behavior and improve product design. For example, companies use consumer satisfaction surveys to study customer attitudes. They described different perspectives of marketing intelligence and created a framework to manage big data. A system that gathers and analyzes online discussions as it relates to consumer products can be observed in the study by Kiani et al. (2018), using a wide variety of state-of-the-art techniques including crawling, wrapping, text classification, and computational linguistics. Online discussion is gathered and annotated within a framework that provides for interactive analysis that yields marketing intelligence of our customers.

In the approach proposed by Yang, Chen, and Chang (2015), the DA-SC technique is superior to existing sentiment classification techniques because it requires few domain-independent knowledge resources and it can handle large volumes of unlabeled domain-dependent consumer reviews by using the adopted constraining algorithm to overcome the application domain barriers in sentiment classification. Lu et al. (2015) observed the aim of developing recommended systems to reduce information overload by retrieving the most relevant information and services from a huge amount of data, thereby providing personalized services. Another way to understand different behaviors can be observed in the study by Hattula, Schmitz, Schmidt, and Reinecke (2015) which analyzes the positive relationship indicated by conventional wisdom. Managers in a marketing department with moderate influence within the organization are significantly more likely to disseminate market intelligence than those in low and, interestingly, high influence departments.

In order to manage a salesman's behavior efficiently and overcome drawbacks of traditional management style, the article by Seidlova, Poživil, and Seidl (2018) introduces a new system of marketing dynamics tracking and competitive intelligence collection based on mobile communication technology, system architecture, and software function frameworks that are discussed in detail.

Some ideas on how marketing intelligence and planning (MIP) might further pursue its crossover mission in the future are highlighted by Sharma (2014). His findings covered a number of ideas that are outlined under the following headings: creating a MIP community, creating mutually interesting content, demonstrating practical application, and establishing links with professional bodies and motivating academics. Another perspective is the degree of informational dependence of marketing intelligence professionals relevant to internal sources of information in order to make decisions (Oliveira, Gonçalves, & Paula, 2011). It was also clear the relationship between frequency of use of information sources with the degree of importance attributed by users.

In their paper, Martínez-López and Casillas (2013) made a historical literature review of artificial intelligence-based systems applied in marketing, covering a time period of several decades (from the 1970s to the present day). They concluded that intelligent systems have potentialities and strengths to support decision-making situations faced by companies, especially those of a strategic nature where good strategic intelligence is necessary. Kordon (2010) describes in his study a guideline for a systematic marketing approach for promoting computational intelligence in industry. The proposed research marketing strategy includes three key steps. The first step identifies the target market (industry, government, or academia). The second step defines and protects the product. The third step implements the promotional strategy by publishing conference presentations and advocating technical and business advertising. Different mechanisms of marketing computational intelligence through interactions between academia and industry, such as protecting intellectual property, publishing, conference advertising, technology development, and interactions with vendors are discussed.

Marketing intelligence can contribute more fully to the strategic intelligence process and help establish an intelligence culture that incorporates counter-intelligence. By adopting a broader understanding of what strategic marketing represents, marketing managers can devise new approaches to managing customer relationships and can develop international/global brand positioning strategies that when implemented they counter the actions of legitimate competitors and new entrants, and disrupt the actions of counterfeiters and fraudsters, according to Lee and Trim (2008).

RESEARCH METHOD

This study was developed in two phases: (1) identification and (2) analysis. In the first phase, our research identified theories about tourism, competitiveness, and marketing intelligence. In the second phase, the researched information was analyzed to how marketing intelligence can support tourism companies to increase their competitiveness. A literature review was made through the electronic database Scopus, using the following keywords: ‘marketing intelligence’ and ‘tourism’ and ‘competitiveness’. The search was limited to full text articles in the English language and published in journals. We were able to identify only 03 studies. Another review was made using the same keywords but through a different approach: ‘marketing intelligence’ or ‘tourism’ and ‘competitiveness’. It was possible to identify 1834 studies. Upon applying a filter for ‘Open Access’, ‘Article’, ‘Final Publication Stage’, ‘Competitiveness’, ‘Tourism’ and ‘Marketing’ and ‘Journals Type’, ‘English Language’, we found 69 studies. The references of all relevant retrieved studies were also searched manually for additional studies. A total of 85 papers were identified as meeting the criteria for inclusion in this review.

FINDINGS

This chapter's description was accomplished according to a literature review in the Scopus database. All information was shared to ensure competitiveness in the business in the tourism sector using marketing intelligence. Through a literature review, it was possible to identify the first search results of 1834 studies using two keywords, competitiveness and tourism. When we followed another approach in the search using marketing intelligence with more than one keyword in the Scopus database, we identified only 03 studies. In our opinion, the topic of marketing intelligence in the tourism sector for competitiveness is an opportunity to develop other studies.

The tourism sector is in constant evolution, allowing for the creation of more opportunities for business services. The internet is very important to do business in any kind of economic sector, and it is responsible for the rapid development of information; thus, changing the way of doing business in the tourism industry. The internet can serve as an effective marketing tool in tourism to support future implications about decisions made in the present. The highly competitive environment of the industry has forced tourism firms to look for ways to enhance their competitive advantage, creating alternatives to become more competitive. Occasionally, competitiveness can be part of the problem, such as contributing to environmental degradation, negative social and cultural impacts, and habitat fragmentation. It is time to identify a new form of regional and global development, such as a type of clustering of similar groups to become more competitive in the business. To become more competitive in some regions, it is necessary to become leaders in the global economy, creating coalitions and strong relationships with investors, and strengthening their competitiveness.

Some ideas on how marketing intelligence supports tourism companies to increase their competitiveness are identified through intelligent systems to support decision making faced by companies, especially those of a strategic nature, where good strategic intelligence is necessary. Marketing intelligence can contribute more fully to the strategic intelligence process and help establish an intelligence culture that incorporates counter-intelligence using different mechanisms of marketing computational intelligence through interactions between academia and industry, such as protecting intellectual property, publishing, conference advertising, technology development, and interactions with vendors.

The degree of information dependence of marketing intelligence professionals relates to internal sources of information to make decisions. It is possible through a new system of marketing dynamic tracking and competitive intelligence collection based on mobile communication technology, system architecture, and software function framework as discussed in detail. The other option is to do the same using social media to grow and increasingly influence many social and economic platforms of the tourism and hospitality industry. Nowadays, consumers are changing extensively by being more inquisitive, creating networks in social media, and writing reviews. Decision makers became increasingly aware of the drawbacks of mass tourism. They are searching for alternative tourism planning, management, and development options.

DISCUSSION AND CONCLUSION

This study describes how marketing intelligence can support tourism companies to increase their competitiveness. First, leadership needs to make different decisions in using the internet to get more information and understand the costumer's behavior. Second, the tourism sector is changing on a daily basis, creating opportunities to do business and develop economies. Now the momentum is more intelligent, dynamic and digital.

The consumer is changing extensively, making more inquiries, creating networks in social media, and writing reviews. It is time to understand the new behavior of consumption in tourism. Currently, they are creating a more specialized, technological, and sophisticated market. Physical and virtual are in the same plan, creating offline and online decisions simultaneously.

Companies have become more competitive and the strategic decision-making ability in the business is based on factors such as technology, innovation, knowledge, and the human capital. Understanding the new costumer behavior, analyzing information, and making the right decisions are the three main characteristics of marketing intelligence, a part of a marketing strategy that enhances the competitive advantage of the company and supports future decisions. It is a specific topic in marketing used by researchers and professionals to identify different ways to use in the business world.

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Chapter 17
Applicability of Circular Economy in the Hospitality Industry:
Consumers' Perception

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ABSTRACT

As a growing trend and sustainability tool, characterizing consumer concern, behavior, and intentions towards circular practices is an important starting point to the adoption of Circular Economy. With a major focus on Hospitality Industry, an exploratory survey was conducted, approaching foreign and domestic tourists based on an online questionnaire, which produced 203 valid answers. Initial findings suggested most consumers are willing to accept green and circular practices when choosing their hotels. Furthermore, participants mentioned being concerned about the environment and the water consumption, supporting sustainable practices to minimize such environmental impacts. Taking into account age and gender, it was possible to understand which Circular Economy practices can influence most consumers' decisions and choices.

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INTRODUCTION

Current society lives in a constant demand for new product and service consumption, contributing to significant resource scarcity, environmental problems and consequent climate changes and impacts (Antikainen et al., 2015). As a result, the traditional linear economy model, focusing on extraction-transformation-utilization-disposal (MacArthur, 2013) is no longer efficient or sustainable in current social and environmental context. For this reason, there is an effective need to reduce resource consumption and achieve higher environmental and economic efficiency, creating incentives to improve the global value chain from the production of a service or product to the consumer, creating new opportunities, economic competitiveness and resilience for businesses (da Cruz, 2017; Preston, 2012).

Sustainability and environmentally responsible activities are part of current companies' concerns. There is a social pressure towards businesses to become more sustainable, focus on social, environmental and economic benefit and to adopt new methodologies and strategies that look for resources' efficiency (Julião, Gaspar et al., 2019), creating this way a balance between planet, profit and people (Rheede, 2013).

Regarding the touristic activity, it is known that tourism is classified as the third largest export sector in the world (Planet, 2018) and the third largest socio-economic activity in the European Union (Girard & Nocca, 2017). However, such activities have a significant contribution to environmental pollution and ecosystems degradation (Chengcai et al., 2017; Partnership, 2014), producing 5% of global CO_2 emissions. Moreover, hotels alone produce approximately 21% of the CO_2 that is emitted in all of the tourism sector (Girard & Nocca, 2017; Han et al., 2011; Londoño & Hernandez-Maskivker, 2016). To reduce such impacts, current governments have been pressing the lodging industry with new regulations, promoting the adoption of new strategies in order to reduce their impacts and the related global carbon footprint (Berezan et al., 2010).

Considering that current consumers are largely concerned about environmental changes and degradation (Shen & Zheng, 2009), the hospitality industry needs to be receptive and flexible to future changes of behavior, not only by these sustainability aware consumers, but also taking into account their management sustainability concerns and decisions.

There is a need to move towards a sustainable and greener tourism (Chengcai et al., 2017) and, as some authors sustain, such an innovative approach and model, which incorporates the principles of the Circular Economy (CE) – reuse, reduce, recycle – should be applied to all economic activities, including tourism and the hospitality industry (Julião et al., 2019; Nedyalkova, 2018). Regarding the latter, hospitality is nowadays considered one of the largest water and energy consumer, and even a greater producer of waste. It seems to be an evident need to seek for new and alternative strategies to develop waste management, water savings and energy conservation (Verma & Chandra, 2018b). As a result, even though CE appearance in hospitality industry could be seen as a solution to approach resource scarcity and sustainable problems, the lack of studies approaching the connection of these two subjects is visible. Thus, the purpose of current study is to explore and approach consumers' awareness and preferences towards CE and sustainability-oriented hospitality industry practices in order to explore their motivations, knowledge and relations between consumer intentions and attitudes.

SUSTAINABILITY AND CIRCULAR ECONOMY IN THE HOSPITALITY INDUSTRY

Sustainability can be defined as a holistic, futurity and equity concept, that includes, as a whole and in an interdependent way, environmental, economic and social dimensions (Rheede, 2013). As a rising problem, the lack of sustainability concerns not only current society, but the whole consumption sphere, from the end user to the businesses provider. Thus, environmentalists and economists alike keep searching and looking for feasible and reliable alternatives to fight such sustainability demands, reducing resource consumption while achieving higher environmental and economic efficiency (British Standard Institution, 2017).

Circular Economy as a Model Towards Sustainable Development

CE was referred for the first time in the 1990s (Berndtsson, 2015; Ghisellini et al., 2016; Rizos et al., 2017), linked to industry ecology (MacArthur, 2013), as an improved industrial system that focused on restorative and regenerative design, and supporting ecosystems by replacing the end-of life concept (open models with higher waste) with repair and reuse. CE is currently based on energy and resources efficiency, optimizing the whole life cycle of the product – or service – (Angelis, 2018; British Standard Institution, 2017; Girard & Nocca, 2017; MacArthur, 2013; MacArthur et al., 2016; Preston, 2012), approaching the environmental and growth challenges related to overconsumption, overproduction and waste increase (Schroeder, et al., 2019). As a consequence, current hospitality industry – as other activities alike – are working to reduce the negative impacts resulting from current linear model (Bohdanowicz, 2003) and developing more sustainable CE-based alternatives.

In order to achieve sustainable development, worldwide leaders and existing market companies are facing a significant social pressure to adopt eco-efficient solutions throughout all of current product and service value chains. Nonetheless, changing consumption and production patterns in order to get natural resources' efficiency while reaching economic and social development requires a radical transformational and systematic change of companies' attitudes and business models (Preston, 2012). As a result, CE appears as a sustainable development strategy that can successfully contribute to achieve all of the three main dimension of sustainability: economy, environment and society (Murray et al., 2015). To such end, there is a need to tackle the crucial challenges of environmental destruction and resources scarcity (Korhonen, et al., 2018), reusing and recycling materials, maximizing all energy, reducing waste and regenerating value from it while being sustainable (Heshmati, 2018). Moreover, it was proved that CE can be closely related to the UN's Sustainable Development goals, which aims to reach a resource's use efficiency and pollution reduction, looking for the whole life cycle of the goods (Brightley & International Institute of Gastronomy, Culture, 2017; Wit et al., 2018).

On what concerns the CE's environmental goals, there is a focus on reducing virgin raw-material, energy inputs, waste and emissions of the production-consumption system by applying long-lasting and biological materials with access to renewable energies. Economically, the CE's main objective is to create higher value from the production-consumption system, reduce material and energy costs while being innovative by creating new alternatives and opportunities for a new market and new businesses (Korhonen et al., 2018). Therefore, environment and economics show to be closely related, as CE allows improving and reinforcing the relation between them. Otherwise, if environmental issues are not significantly taken into account, it may lead back to an original linear economy model (Brightley & International Institute of Gastronomy, Culture, 2017; da Cruz, 2017; Heshmati, 2018). Finally, considering the social sustainability dimension, it allows focusing not only on improving equity, social justice, and cohesion but also on reducing poverty and inequality (Koumparou, 2018).

Green Hotels and Practices

Green hotels, eco-friendly hotels or ecologically friendly hotels are also known by various authors as environmentally friendly lodging properties. These hotels adopt sustainable methodologies, responsible operations and ecological programs to protect nature whilst promoting conservation, recycling and energy efficiency, decreasing operational costs, thinking in future generations' protection and provide to consumers healthy, hygienic, sustainable and clean products (Millar et al., 2008; Verma & Chandra, 2018b, Verma & Chandra, 2018a, Verma & Chandra, 2018c).

It is known now that green practices allow supporting the hospitality industry to move towards more sustainable goals and, also, a crucial reason for sustainability aware travelers to choose hotels (Chengcai et al., 2017; Verma & Chandra, 2018a). Thus, as an approach to sustainability, it is possible to correlate green tourism with CE principles, as both practices convey their efforts on the search for waste reduction, recycling solutions, energy and resources savings whilst reducing operation cost. Moreover, both concepts incorporate and involve all the three dimensions of sustainability (Millar et al., 2008; Schroeder et al., 2019) and require a balance between innovation, technology and new business models (Brightley & International Institute of Gastronomy, Culture, 2017).

As a growing trend, green practices are currently highly demanded by sustainability aware consumers (Londoño & Hernandez-Maskivker, 2016). These practices are measures adapted by management teams on hotels in order to decrease the negative impacts on environment (Yusof et al., 2017), fighting mainly energy consumption, water excess and waste management (Kang et al., 2012). Using non-polluting soaps (Han et al., 2011) or refillable shampoo containers (Verma & Chandra, 2018b), creating auto-controls for heating and cooling systems (Kang et al., 2012; Verma & Chandra, 2018b), adapt locally grown products (Verma & Chandra, 2018a), installing energy efficient lighting to conserve energy, switching incandescent lights for LED (Ogbeide, 2013; Rheede, 2013; Ruben, 2001), creating new systems of waste and energy management, adopting renewable energies (Rizos et al., 2017; Verma & Chandra, 2018a, Verma & Chandra, 2018c), recycling practices and programs as a way to reduce waste (Kang et al., 2012; Verma & Chandra, 2018a, Verma & Chandra, 2018c; Yusof et al., 2017), creating electronic check-ins contrary to paper check-ins (Ogbeide, 2013), reuse derelict buildings and applying linen reuse programs in rooms (Kang et al., 2012; Verma & Chandra, 2018a) are examples of green practices that have the same focus as CE, and can create environmental impact whilst increasing travelers' attention to conserve and protect (Kang et al., 2012).

Hospitality Consumers

CE appeared creating industry and economic regeneration with a healthier environment (British Standard Institution, 2017; MacArthur, 2015; MacArthur et al., 2015; Schroeder et al., 2019) focused on high productivity and resources' efficiency (Schroeder et al., 2019) due to the easy ability to track resources and optimize their use, reducing inputs and their externalities (Brightley & International Institute of Gastronomy, Culture, 2017; British Standard Institution, 2017; da Cruz, 2017; MacArthur, 2013; Preston, 2012). On the other side, as main enablers, customers play an important role when deciding to adopt

CE practices. Therefore, it is important to study their acceptance and the advantages that they can bring (Antikainen et al., 2015) to all economical activities, and to the hospitality industry in particular.

In a consumers' point of view, when hotels are applying green practices – or CE methodologies – market demand grows side by side with customer satisfaction (Han et al., 2011). Nowadays, consumers are increasingly receptive to new practices and new models, getting more interested in green and circular practices. As a result, applying CE principles should allow for creating added value, when compared to conventional alternatives, whilst influencing traveler's decision-making (Antikainen et al., 2015). It was highlighted from some authors that hotel guests feel emotional advantages when applying for a green hotel. These emotional benefits can be expressed with a feeling of self-expression, awareness about the next generations or even by an altruistic behaviour where the environment is the main concern (Han et al., 2011). To conclude, applying CE, can be seen as a «free access» for consumers to improved products and services, where durability and longevity increase (European Commission, 2015) and the relationship between consumers and businesses is based on a service model focus on convenience, durability, and quality (British Standard Institution, 2017).

In the hospitality industry, green practices are seen as a positive sustainability marketing strategy for hotels, products and services (British Standard Institution, 2017; Suki & Suki, 2015) that contribute to increase customer's ratings, visibility (Kang et al., 2012) and hotel reputation (Yusof et al., 2017), improving the relationship between hotels and clients (British Standard Institution, 2017) while creating efficient buildings with energy efficiency, pollution and waste reduction (Brightley & International Institute of Gastronomy, Culture, 2017; Bruns-Smith et al., 2015).

Thus, considering current hospitality industry sustainability concerns, a growing consumers' green awareness, the focus on the environment and its protection and the clear connection with CE, there shows to be an effective need to study these issues in an academic context. Particularly, it seems important to identify a set of green practices that would be easily adaptable by the hospitality industry and that ought to be well accepted by consumers, understanding their motivations and attitudes toward such sustainability solutions. This is the main goal of current research study.

METHODOLOGY

In this study, a survey had to be developed in order to characterize consumer awareness and preferences regarding hospitality industry's sustainable, circular and green methodologies. Previous to planning the final questionnaire, there was a need to clarify which subjects should be addressed and better accepted by current consumers. In agreement with the literature review, but also following current social media trends, blogs and reviews, as well as street interviews, it was possible to gather information in order to help designing the final survey's questionnaire.

Current study is of a clear qualitative and exploratory nature, where relationships and real social contexts are analyzed focusing on finding a consumer's behavior pattern (Kawulich, 2004). To such end, a deeper knowledge about society's behavior, perception and perspective based on their experiences, backgrounds, attitudes and values is needed. Therefore, the survey's questionnaire was designed to answer the above-mentioned objectives, being divided into four main groups:

1. Sociodemographic of the respondents.
2. Participants' awareness about CE and sustainability.
3. Circular and green hospitality practices.
4. Participants' preferences about CE practices in the hospitality industry.

Regarding the sample definition, there was no need to predefine the sample and determine the number of answers (Gray, 2017). However, it was stablished a minimum of 200 answers, as of a similar study related to consumers' perception about green hotels (Millar et al., 2008). The final questionnaire was applied online through social networks, mainly Facebook and LinkedIn, as a channel to address a larger group with different ages, backgrounds, experiences and beliefs in a convenient and accessible way.

With a qualitative basis, it was possible to have a deeper knowledge and understanding about their motivations, attitudes, emotions, agreements and disagreements. During the development process, a set of questionnaires was conducted personally, face-to-face, in order to compare such approach with the online survey, inferring about possible biases in some of the questions but also to get further information about the research topic based on qualitative data.

The survey was based on closed questions, with multiple choice, Likert-scale or even ranking questions. On the other side, opened questions were used for the street interviews. The final questionnaire was designed taking into consideration two main parts: sociodemographic questions and consumer preferences, awareness and knowledge questions. The goal was to retain from the sociodemographic questions, the detailed data from participants, as age, gender, income, etc. (Gray, 2017), while the main questions were based on the literature review or adapted from similar studies.

The main baseline of current exploratory research to help comparing consumer's perceptions was a similar sustainability study conducted in Portugal during 2016 (Schmidt et al., 2016) as well as a study based on consumers' preferences for green hotels (Millar et al., 2008). This exploratory survey was conducted mainly in Oporto city to domestic and foreign tourists in 2018/2019, which produced 203 valid answers.

RESULTS AND DISCUSSION

As proved before, hospitality industry operators and managers are conscious of the need to value sustainable, green and circular practices in their business models, as the customers' environmental consciousness positively influences their green consumer behavior.

These operators and managers are also aware of the main advantages that this type of practices can bring to their businesses, improving consequently sustainability and economic efficiency. As a result, it is key to understand on what extent current customers are actually willing to accept green and circular practices offered by the hospitality industry.

In order to better understand the circularity of resources used by current hospitality industry, a set of green practices was proposed in a view to be applied on a more responsible and sustainable way by operators and managers. Such CE practices should allow consumers to become eco-friendly tourists, combating the climate changes and resources inefficiency, whilst making them participants in the process of minimizing the impacts of this economic activity on the environment (Verma & Chandra, 2018a).

Green and Circular Practices in the Hospitality Industry: Consumer's Perception Survey

A dedicated survey was carried-out in one of the main touristic destinations in Portugal (Europe) – namely Oporto city – to characterize local consumers' perception towards green and circular practices related to the hospitality industry. After conducting this exploratory study to domestic and foreign tourists using a dedicated questionnaire, it was possible to retain some main conclusions and further understanding and information regarding the current consumers' awareness towards CE practices, impacts in the hospitality industry and in their daily routines:

Group 1 Questions: Sociodemographic of the Respondents

Based on the questionnaire results, it was possible to realized that from the 203 valid answers, most of the participants (64%) were between 18-24 years old however. Nonetheless, when conducting the face-to-face questionnaires, the above 24 years old were the target groups mostly aimed. On what refers to the respondents' literary qualifications, "Bachelor Degree" and "Master Degree" were the options most selected, probably explained by the fact that the LinkedIn network – one of the channels chosen to spread the questionnaire – is mainly focused on the business world. The respondents' male/female gender ratio was of 36%/64%.

Group 2 Questions: Participants' Awareness about CE and Sustainability

After gathering the main sociodemographic information, the first group of questions was dedicated to infer about the participants' awareness on sustainability and CE practices, analyzing the relationship between participants' answers and their literary qualifications. Based on those results, it was realized that almost all participants referred being familiar not only with the concept of «environmental sustainability» (96%), but also with «eco-friendly products» (93%). Other sustainability-related concepts were mentioned by the respondents as being familiar to them, *e.g.* «eco-efficiency» (67%) or «eco-design» (53%). A group of remaining sustainability-related concepts showed to be less known by the respondents, with the «Circular Economy» concept mentioned to be the less known to the interviewees. For all ages and literary qualifications, the two less known concepts were «Circular Economy» and «Green Hotels». However, it was possible to observe a significant pattern in the questionnaires' answers, as the two latter concepts were better known and understood by graduated respondents than by the non-graduated.

Regarding the question about which of the sectors should be a priority for governance to help implementing CE strategies, for more than half of the participants (56%) «Education and Training» should be the governance's focus. «Environment» came in second with 13% of total answers. Finally, the third of eight alternative answers were the «Renewable Energies» with 12% of all answers. Considering the gender ratio, as the question aimed to infer about the personal opinions and the level of awareness about environmental problems, it was possible to conclude that female respondents were more sensitive to problems related with the environment and environmental sustainability.

When asked about some CE initiatives related to the hospitality sector, the respondents highlighted their preference for «national products», directly followed by «produce less with less negative impacts on environment» and «give priority to the local economy and products». In a total of 203 answers, when analysing in more detail to the correlation of each statement with the respondents' age, one can conclude that the younger generations 18-24 and 25-35 years old, were the two age groups showing to be most concerned about the negative impacts on the environment. It was also observed that the respondents' last two generations (44-60 years and 60+) did value most the use of national products as sustainability practices in a CE model.

Group 3 Questions: Sustainable, Green and Circular Hospitality Practices

On what refers to the participants answers to sustainable, green and circular hospitality practices, it was intended to identify consumers that mentioned having already stayed in a green hotel amongst those that stated never having stayed in such type of hotel. When analysing the results of current survey respondents' willingness to accept circular and green practices – as was also concluded in previous similar studies – consumers that mentioned having already been to a green hotel showed to be more receptive to accept green and CE practices, to pay a premium price or to travel farther for such CE related lodgings.

On the other side, when testing participants' motivations for selecting green hotels, both the online questionnaire respondents as on the street interviews, all participants referred in a consensus that the «concern for future generations» and mainly the «concern for the environment» were the main motivations to apply for CE related lodgings. It was also proved in previous similar studies that consumers feel emotional benefits when saving the environment for future generations (Han et al., 2011) and that current consumers believe that environment protection and conservation is becoming crucial for the hotel industry (Chen, 2014).

Group 4 Questions: Participants' Preferences about CE Practices in the Hospitality Industry

In the survey's fourth group of questions, the participants' preferences about CE practices in the hospitality industry were identified. Thus, with the aim of perceiving which attributes the participants valued the most in CE (and non CE) related lodgings, it was a consensus amongst all respondents that price and location received the highest preferences.

Considering the CE practices that current consumers show to be able adhering to, it is known that the green activities that they can perform at home may also be easily related to green practices in hotels. For that reason, one of the goals of the applied survey was to relate participants' green daily activities with the CE practices that can implemented in a hotel. It was also possible to recognize that society, independently of the generation, is able to recycle and reuse, probably, due to the simplicity of the process and the facilities that are currently provided. When comparing to activities that can be performed inside a hotel room, recycling, using refillable shampoo containers and reusing bed sheets, were considered the top three most preferred practices by the survey's respondents.

In order to understand which practices would be preferred by the survey's participants (based on a full list of well-accepted hospitality practices) a dedicated question was built taking into account twelve different CE and green practices that can be implemented in a hotel (Table 1).

Considering the participants' preferences stated in Table 1, staying in a paper free hotel, paying more and travel farther to reach a green hotel are practices that are less accepted by participants. As also referred by Dimara et al. (2015), consumers mentioned not being willing to pay more for environmentally friendly products, even though they stated being keen to support companies that operate with green practices. In a nutshell, in current survey, consumers mentioned price and location as their most

Table 1. CE and green practices that can be implemented in a hotel: Level of preference based on age groups of respondents – 1 (min) to 5 (max)

Rate from 1 (min) to 5 (max) the following statements:	18-24 years	25-35 years	36-44 years	45-60 years	60+ years
As a night guest in a hotel, I am willing to stay in a hotel that uses refillable shampoo containers	4,55	4,36	3,6	4,25	5,0
As a night guest in a hotel, I am willing to stay in a hotel that was rebuilt from derelict buildings	4,49	3,88	3,4	4,04	4,7
As a night guest in a hotel, I am willing to accept a free paper hotel	3,58	3,09	3,2	3,61	5,0
As a multiple night guest in a hotel, I am willing to accept a heating self-control system	3,89	3,42	3,4	4,0	5,0
As a multiple night guest in a hotel, I am willing to travel farther to stay in a green hotel	2,68	2,42	2,5	3,0	2,3
As a multiple night guest in a hotel, I am willing to pay more to stay in a green hotel	2,71	2,33	3,0	2,89	3,0
As a multiple night guest in a hotel, I am willing to eat organic and local food	4,16	3,36	3,8	4,0	3,3
As a multiple night guest in a hotel, I am willing to recycle	4,54	4,18	3,9	4,29	5,0
As a multiple night guest in a hotel, I am willing to have showers instead of baths	4,4	3,88	4,1	4,57	5,0
As a multiple night guest in a hotel, I am willing to have less lights in the room and LEDs	4,43	4,3	4,1	4,14	4,3
As a multiple night guest in a hotel, I am willing to reuse my bed sheets	4,52	4,27	4,0	4,32	5,0
As a multiple night guest in a hotel (staying more than one night), I am willing to reuse my towel	4,33	4,30	3,7	4,36	5,0

important hotel attributes, whilst paying a higher price or traveling farther to stay in a green hotel, were their less preferred CE/Green practices.

When analysing in more detail consumers' ratings of Table 1, «reusing bed sheets» was, in average, the most preferred CE practice. This indicates that, for hotel guests, it is well accepted if a hotel applies a linen reuse program, mainly bed sheets or towels. Using refillable shampoo containers was the second best accept CE practice, followed by recycling. To conclude, most of all CE practices mentioned in Table 1 were well accepted by the respondents. Even though the preference differences between generations were not so significant in this study, younger participants seemed to be more willing to accept green and CE hospitality industry practices than the oldest generation. Thus, Table 1 results allow designing a preliminary guideline of CE practices for hotel operators and managers, if they aim to become greener.

Since the core of current research study was to «to explore and approach consumers' awareness and preferences towards CE and sustainability-oriented hospitality industry practices», the gender type was one of the correlations to take into consideration when analysing the survey's results. This allowed concluding that overall female respondents – as also concluded by Millar et al. (2008) – are more willing to accept the green and CE hospitality practices proposed. Nonetheless, on what refers to the willingness to pay more, travel farther and accept a paper free hotel, male respondents showed to be more willing to prefer such green and circular practices.

Although current consumers seem to become aware and conscious of the need for change, about 8% of participants considered that green practices are not important at all, when staying in a hotel. Nonetheless, it seemed important to understand customers' travel type when assessing green practices. As a result, in this research, more than half (57%) of respondents' state supporting more sustainable practices when their travel purpose is of «leisure».

For current research participants, about one third (35%) considered water reduction as the most important green practice that a hotel should apply. This finding is complemented by the latest study about TripAdvisor comments regarding the green leader program (Gil-Soto et al., 2019), where water was the most commented CE practice, followed by waste minimization and energy control.

To conclude, when considering CE practices that contribute to reducing global water consumption in hotels, like the reuse of towels and bed sheets or having showers instead of baths, these CE proposals were highly preferred by consumers, suggesting that practices focusing on water reduction are well received, accepted and supported by customers.

GREEN AND CIRCULAR PRACTICES IN THE HOSPITALITY INDUSTRY: CONSUMER'S PERCEPTION DISCUSSION

In a nutshell, the main objectives of current exploratory research were defined as:

1. Characterize CE and its main advantages for consumers and hotels in the hospitality industry.
2. Describe how CE can be implemented in the hotel industry, identifying main related practices.
3. Discover consumers' motivations for choosing a green hotel.
4. Explore the receptiveness, perception and attitude of consumers in relation to a sustainable hotel and its practices (intention vs. attitude).
5. Relate the consumers' travel purpose and their willingness to accept green attributes.
6. Explore the knowledge about main concepts approached in this research and CE practices in hotels.

Research Objective 1

Concerning the first of the above stated objectives, it can be, in part, linked with the last of the list, since CE is in the core of this research and is addressed to consumers. As a result, CE is nowadays defined as a new economy model, that allows creating value by regenerating and transforming products and consumption systems, lowering global waste generation (Camacho-otero et al., 2018). It can be summarized by seven elements: design for the future, incorporate digital technology, collaborate to create joint value, rethink the business model, use waste as a resource, preserve and extend what is already made, prioritize regenerative resources (Wit et al., 2018).

In this investigation it was proved that the new circularity concept is not well accepted by current customers. Thus, even though CE appeared to change consumers' lives, as shown in this research, it is still mostly unknown to current consumers (Camacho-otero et al., 2018).

As far as society is concerned, environment protection and sustainability are now starting to be present in people's daily lives (Verma & Chandra, 2018b). The 3 R's model, as an enabler to CE (Yang et al., 2014) is part of society nowadays, and as reflected in this survey, is considered a regular routine for consumers. About 76% of participants recycled "Last Week", 57% reused products «Last Week» and less respondents repaired products «Last Week» due to the greater difficulty of repair. However, the main gap concluded that consumers are not able to relate the 3 R's model, sustainability and green practices to CE practices. Thus, as also addressed in the sixth research objective, only few participants were familiar with concepts as «Circular Economy» and «Green Hotels» and only 33 respondents (on a total of 203) could identify all of the practices proposed in Table 1 as green and sustainable.

Research Objective 2

Regarding the second research objective, it was intentionally related with objective number 4 of the above-mentioned list. Most of the practices that can be adapted in the hospitality industry, summarized in Table 1, were identified and described in the Literature Review.

CE is currently mentioned as a way to battle and replace the traditional linear model and may be easily adapted to the hospitality industry since it can put into practice alternatives for waste reduction, recycling, energy and resources' control whilst reducing and saving operational costs. Furthermore, CE is nowadays present in several businesses as a way to improve the relationship between the economic growth and environmental sustainability, thus affecting the complete value chain (Rizos et al., 2017).

All considered, CE goals focus on implementing operational efficiency on resource supplier, waste assimilator and source of utility (Rizos et al., 2017). Thus, for hospitality industry operators and managers it shows to be key to test and implement circularity practices and solutions, as well as to assess their acceptance and reactions by the consumers. Globally, green and circularity practices to be used in the hospitality industry are designed to improve energy, water and waste consumption (Kang et al., 2012).

Research Objectives 3 and 4

When addressing the third objective of current exploratory research, the first motivation for consumers to select a «green hotel» was being concerned about future generations. This finding was also identified by Han et al., (2011) in their investigation about green lodging.

Even though environmental issues seem to become a major concern for current society – as also shown in this study – price and location are still the main attributes valued by consumers to select a hotel. As a result, getting hotel management teams and operators aware of current society trends and preferences, should help them deciding to move towards a more sustainable, greener and circular hospitality.

These results are closely interrelated with the fourth objective, exploring the receptiveness, perception and attitude of consumers in relation to a sustainable hotel and its practices. From society's point of view, consumers need to be aware and conscious about their need for change, not only in their consumption habits (Verma & Chandra, 2018a) but also in their consumption pattern and daily activities.

Research Objectives 5 and 6

Consumers are now starting to adopt daily activities regarding saving water, waste, energy, etc. as defended by Schmidt et al., (2016) and as also proved in current research. For this reason, hospitality operators and managers are expected to move forward to greener services and products. But the question remains: are current consumers ready to move towards this circularity paradigm?

As proved before, hotel guests show to be willing to adopt and accept green and CE practices proposed by the hospitality industry. Nonetheless, when considering the twelve circularity practices proposed in Table 1, when compared to attributes such as price and location, respondents were less keen to prefer the circularity.

Finally, considering third research objective of the above presented list, consumers' travel purposes and their willingness to accept green and CE practices was analyzed and discussed. Thus, as observed before, more than half of respondents mentioned preferring green activities when they are traveling in leisure purposes. This can be seen as an idea for hotels managers that focus their hospitality business on leisure, to address more green practices and solutions.

The sixth and last research objective was to relate consumers' knowledge and perceptions towards some key circularity concepts discussed throughout this investigation in the scope of the hospitality industry. and their capacity to identify and distinguish a green practice when they are being used. As a result, only one fourth of the participants have identified all of the proposed practices as green and circular practices.

SUMMARY AND CONCLUSION

As described in the previous section, a set of six main objectives were defined in the beginning of this research and complemented on one hand with a theoretical approach and an applied approach. The first was based on the literature review, in which the two initial research objectives were addressed, identifying and discussing sustainability, green and circular practices that can be implemented in the hospitality industry. The second approach was based on a dedicated questionnaire and the preliminary research, as the remaining four research objectives were tackled. All of the aimed goals were thoroughly worked on and, as explained before, a set of main conclusions were derived.

MAIN CONCLUSIONS

It is possible now to state that «Circular Economy» as well as «Green Hotels» are the less familiar concepts amongst the survey's respondents, being «Environmental Sustainability» the better known of the circularity related terms. Nonetheless, the environment is considered by consumers as a top three priority for the governance to focus on, being female respondents the gender type most sensitive to sustainability and circularity practices in the hospitality industry.

It was also possible to conclude that female respondents are more willing to accept green and circular practices than the male gender respondents. Even so, when considering paying more and travel farther, male respondents state being most willing to do such effort than the opposite gender. Nevertheless, considering all respondents' preferences, there is a consensus amongst the respondents that paying more and travel farther to choose a green hotel are not so well accepted by current customers.

Considering the daily routine and the 3R's framework, recycle and reuse are the two practices usually done regularly by the survey's participants, although repair is a less usual practice amongst the same group of respondents. Price and location are the attributes that consumers value the most when choosing a hotel, as was also reinforced in the preliminary stage of this study.

Water, in current research, was identified as the most important resource to conserve, since consumers mentioned supporting preferably circularity practices that encourage water reduction and conservation, thus considering «Water scarcity» as the most problematic of environmental issues. This can lead to a main conclusion, where the consumers' intention is closely related with their attitude, since they are able to accept more green practices that value water conservation and at the same time considered water scarcity as the major problem. Although the age group of the participants was not uniformly distributed, it is possible to conclude that younger generations are more keen to accept green practices than the oldest generations, probably explained by the fact that the environment is becoming engrained in the younger generations as they grow up (Millar et al., 2008). Moreover, taking into consideration participants' answers, hospitality industry operators and managers can build a «green» guest profile, focusing on their concerns and benefit the most when investing in green practices (Borisenko, 2018).

Finally, current study allowed identifying and discussing current consumers' perception on the applicability of circular economy and green practices in the hospitality industry, providing a set of information about attributes that hospitality industry operators and managers can invest on. This should encourage hospitality management teams to adopt green practices that are well accepted by guests, creating greener processes and, at the same time, explore new targets and expanding their position in the market.

LIMITATIONS OF THE RESEARCH

As the survey was conducted only in Portugal and, even though other nationality respondents have answered to the dedicated questionnaire, it is difficult to generalize the findings to all geographies. It was also considered the sample as a limitation since it was quite homogeneous, with mainly young generations answering the questionnaire and although few surveys were made personally, the survey was limited to people that had access to an online network.

RECOMMENDATIONS FOR FUTURE RESEARCH

As was also highlighted in other researches (Koumparou, 2018; Murray et al., 2015; Verma & Chandra, 2018b) it is important for future studies to find new ways to reach sustainability in its holistic way, not only in the environment sphere but also in the social and economic field. Exploring not only practices related to energy, water and waste reduction but measures besides environmental sustainability. CE can also reach the social and economic dimension.

In the future it would be interesting to test how the family structure can affect their willingness to stay in a green hotel, and identify a precise amount of money that participants are willing to pay extra for a green hotel. Although this research was opened for every nationality, for future investigations, exploring other nationalities would complement current research.

As concluded in the preliminary research, as also in other studies (Gil-Soto et al., 2019), exploring the importance of hospitality industry to communicate effectively regarding CE and green practices would be beneficial. It is key to understand if and how current marketing strategies apply CE principles.

In this research, the consumers' perceptions were the main focus. However, it would be also interesting to address current issue throughout the whole hospitality industry value chain. Finally, since sharing economy is seen as a CE practice, it should also be addressed in future research related to the hospitality industry applicability of CE.

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Chapter 18
Tourism Policies and the Investment Dynamics of Micro-Level Firms:
The Way Forward to Regional Tourism Development? The Case of Portugal

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ABSTRACT

The economic, social, and political significance of the tourism sector is unquestionable. Its expression and ability to induce economic development, are increasingly important. However, the tourism sector faces a number of structural problems to be solved. Cases of excessive spatial concentration in certain areas of the territory present different dynamics of tourism growth and development. This chapter analyzes how the investment dynamics of small and micro-sized enterprises in the tourism sector contribute to the qualification, diversification, and improvement of destinations, and reduce the spatial concentration of the investment in major tourist destinations. It is not enough for the tourism sector to create wealth in terms of investment, income, and employment. It is also crucial the sector plays a central role in qualifying, diversifying, and improving the quality of supply.

INTRODUCTION

The tourism sector has been experiencing a big growth and development, establishing itself as one of the fastest growing 'industries' in the twentieth century. Recognizing this favorable environment, it is essential and urgent that governments, from developed and developing countries, attach greater importance

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and attention to this sector, considering the role that it can play in the economic development, namely in balancing the deficit of the balance of payments, in strengthening regional networks, and in generating an increased yield and dynamics in job creation, because of its multiplier effect.

Given the multidisciplinary and horizontal nature of the tourism sector, it is essential the participation of the public sector in the implementation of tourism policies that set clear guidelines to all stakeholders, directly and indirectly, involved in the industry. The established goals should reflect the 'needs' of the sector, and must be in accordance with the economic, social and environmental goals of the tourist destination, and in line with the national and regional interests of the country (Beritelli et al, 2007; Bramwell, 2005; Brooke, 1993; Davis, Wanna, Warhurst & Weller, 1993; Goymen, 2000; Krippendorf, 1982; Oliveira, 2003; Stevenson, Airey & Miller, 2008; Williams & Shaw, 1988).

The definition of tourism policies is central and the definition of a strategic vision are essential because they aim to mitigate structural bottlenecks in the sector, increase the average daily tourist expenditure and length of stay, and decrease seasonality, through the growth of revenues, the improvement and diversification of the quality of tourism supply, and the attraction of new markets.

In Portugal, according to statistical data provided by National Statistics Board (INE), and considering the Code of Economic Activities that integrate the characteristic activities defined by the Tourism Satellite Account, 99.6% of the companies that comprise the business structure of the tourism sector are small or medium-sized firms, being 96.7% of them micro scale enterprises.

Despite their micro scale, the tourism private sector demonstrates a great vitality and dynamic, and plays a central role in tourism. These enterprises provide the majority of tourism services and activities, and perform most of the investment in the different subsectors that comprise the value chain of the sector. However, the tourism private sector is mainly constituted by small and micro-sized enterprises, which, given their small size and family structure present a set of constraints which hinder their growth and development.

Many studies that have been conducted in this area highlights the main advantages of this type of enterprises in terms of job creation (Costa, 2012; Costa & Costa, 2013; Getz, Carlsen & Morrison, 2004; Wanhill, 2000); destination competitiveness (Jones & Haven-Tang, 2005; Novelli, Schmitz & Spencer, 2005; OECD, 2008); economic development (Andriotis, 2002; Armstrong & Taylor, 2000; Joo & Rosentraub, 2009; Milne & Ateljevic, 2001; Tinsley & Lynch, 2001); creation of business networks (Breda et al., 2005, 2006; Buhalis & Peters, 2006; Costa, 2005, 2012; Ozturk, 2009; Tremblay & Wegner, 2009); effectiveness and efficiency (Audretsch, 1999; Mouzas, 2006), and innovation and entrepreneurship (Buhalis, 2002; Jones & Tilley, 2003).

These advantages offered by micro, small and medium-sized enterprises come from a set of characteristics and specificities that are inherent to them. The ability of owners, to be able to develop special and personal relationships with customers allows for greater loyalty, proximity and personalized service, meeting the specific needs of each client.

In addition, the ability to use the local network of contacts and information to produce and distribute integrated services / products sought by individual customers. The product could be customized immediately, according to customer requirements, providing a unique and personalized experience for each individual. (Buhalis and Peters, 2006). Moreover, the affective connection to the business allows its owners and / or managers to dedicate all their time to the viability and growth of their business.

Over the past 25 years, public funding for the tourism sector in Portugal has been carried out based on incentives provided by Community Support Frameworks. Despite the recognized economic importance of tourism, the growth that it has been experiencing in Portugal has been realized in a more quantitative perspective (number of tourists or number of nights) rather than a qualitative one (improvement of the service quality). There have been some difficulties in achieving some objectives developed for the sector.

It is, thus, essential to understand the dynamics and the main characteristics of this type of enterprises, in order to articulate and adapt the definition of policies and strategies for increasing and strengthening the tourism private sector (Costa, 2005, 2012; Costa & Costa, 2013; Graetz and Becton, 2001; Hall, 1995; Nilsson, Petersen and Wanhill, 2005; Phelps, 1996; Thomas, 1995; Thomas & Thomas, 2006), and, it is also vital to carry out monitoring and evaluation actions for tourism policies and strategies set by the public sector over the last years.

One of the main difficulties that small and micro-sized enterprises identify is related to the difficulty of access to financing and lack of support from tourism entities, among others. This research aims to verify whether the investment carried out in the period of II and III Community Support Framework took into account the business structure of the tourism sector, in addition to evaluating the role and importance of small and micro-sized enterprises, which characterize the business structure of the tourism sector.

To this end, this paper is organized as follows. After the introduction, the second section presents the theoretical framework of the role of public sector in the definition of regional tourism policies. Section three, presents the private sector investment dynamic, and the specificities of small and micro-sized enterprises. The fourth section describes the research methodology, the sample and the data collected. The fifth section presents the analysis and discussion of results, in terms of location and main features of tourism investment at regional level, distribution and main characteristics of the investment per NUT II, and the regional concentration of the investment. Finally, section six covers the study's synthesis and main conclusions, and future research studies.

The Role of Public Sector in the Definition of Regional Tourism Policies

The role of public sector in tourism has some main functions, which can be highlighted. The coordination function between the various levels of planning (national, regional, local), considering the importance of coordination between strategies defined at national level and its implications for the strategies defined at regional and local level. This function shows the importance of an integration of policies and strategies that are defined at the national level to the 'lower' levels, and that such integration has implications for the implementation of appropriate measures and actions.

The financing is another main function of the public sector in the tourism, analyzed here according two perspectives. The development of tourism implies investments in the construction of basic infrastructures and equipment necessary for the development of tourism (roads, airports, electricity, water, etc.). In fact, it is up to the public sector to create the conditions at the level of infrastructures and equipment, basic sanitation and garbage collection, so that the development of tourism can occur. The private initiative is not interested in investing in this type of actions and is only interested in investing in areas where this type of basic infrastructure is already available; however, these are central to the development of tourism.

In addition, the public sector, with financial incentives, can control and stimulate the development of tourism, in particular in terms of competitiveness, quality and type of development desired. This stimulus can be carried out in three ways: (i) through financial and fiscal incentives, which will allow for greater investment by the private sector; (ii) encouraging research, in order to deepen knowledge about the sector; (iii) and through investment in promotion in new markets or even in existing markets.

The definition of policies and strategies, and the areas of intervention of the public sector in tourism, do not differ much between the national level and the regional level. The domains and areas of intervention at both levels of planning are broadly similar, differing naturally within the territorial scope of incidence, the level of coverage of the objectives and the measures and lines of action defined, which at regional level are more specific, targeted and operational than those defined at the national level.

Inskeep (1991) presents a set of actions aimed at the regional level and the responsibility of the public sector. For this author, public sector actions at the regional level should focus on: (i) regional policy; (ii) inter- and intra-regional accessibility; (iii) definition of the type and location of tourist attractions; (iv) definition of tourism development areas; (v) definition of the typology, abundance and location of tourist accommodation; (vi) analysis and protection of the natural, social and cultural environment; (vii) coordination between the public and private sectors; (viii) regional-based education and training; (ix) marketing and promotion; (x) definition of tourism management and coordination structures (institutional structures); (xi) survey/inventory of resources; (xii) definition of strategies to promote and protect the natural and built heritage. (Inskeep, 1991, pp. 25-45)

Moreover, for Costa (2001), regional tourism organizations should prioritize and pursue their functions at four levels of intervention: "(i) definition of regional tourism policy and its integration into the region's development policy; (ii) management and planning; (iii) promotion; (iv) investment and promoting development."(Costa, 2001, p. 84)

Over the last few years, there has been a growing importance of regional level. One of the reasons given for this growing importance is that the region is itself a tourist destination. This situation is particularly important insofar as the growth and development of a destination implies the existence of a structured and solid dimension, and a structured base of resources and products to be considered a tourism destination.

Another important issue that may justify the growing importance of the regional level in the tourism sector is the articulation function that tourism public entities at regional level have with other areas of government and between the national level and the local level. At the regional level, the policies and strategies defined at the national level are operationalized (Araújo and Bramwell, 2002, Costa, 1996, Dredge and Jenkins, 2003, Inskeep, 1991, LGNZ, 2004, Pearce, 1989 and Whitford 2009).

The link between the regional level and the operationalization of the regional operational programs integrated in the Community programming periods is also a justification for the increased importance of the regional level in general terms, and in tourism in particular. The European Regional Development Funds (ERDF), which serve as financial support for the operational programs, aim to "contribute to the correction of the main imbalances in the community by participating in the development and adjustment of regions and the conversion of declining industrial regions." (Official Journal of the European Communities, June 28, 1984, cited in Pearce, 1989, p.202)

The Private Sector Investment Dynamic as the Support Element for Regional Tourism Development

It is important to recognize the significance of the private sector in the process of boosting tourism at the regional level. The public sector plays a central role in spatial planning; in the qualification of spaces; in the valuation of the natural, patrimonial and cultural resources; in the provision of infrastructure and support equipment; however, only with the contribution of the private sector it will be possible to contribute to the wealth's growth at the regional level.

According to Pearce (1989), Tourism can be a very useful tool for regional development, due to the following main reasons: (1) tourism allows the redistribution and transfer of wealth between the most disadvantaged regions, less developed peripheral areas; (2) tourism can contribute to the exploitation of endogenous resources (natural, heritage, historical, cultural); in addition, tourism (3) promote the dynamization and modernization of regional and local production; (4) the development of tourism leverages investment in basic support infrastructures, construction of access roads, basic sanitation networks and water supply, etc., which enables an improvement in the living conditions of local populations.

However, the nature of this tourism development should take into account the state of development of the sector in the region and the dependence that may exist on tourism (Pearce, 1989). These two issues are particularly important because, if the inputs needed for development to occur, are internally in the region, then most of the development benefits will remain in the region. Conversely, where tourism development depends primarily on external inputs of capital, labor, expertise and technical resources, then the differences between regional economies can be much higher. This is the case in areas, where the lack of adequate infrastructure contributes to disrupt development. (Pearce, 1989, p.203).

According to Thomas et al. (2011), despite frequent references in the literature, this theme remains under-theorized and under-researched. "Sub-theorized, in so far as have been few attempts to explain how the characteristics of these organizations can be understood, trying to describe only its characteristics and behavior (e.g., its genesis, growth and its articulation with the rest of the socio-economic environment in which it is located)"(Thomas et al., 2011, p. 964).

The same applies to job creation and the importance of large enterprises in the creation of a greater number of jobs. No particular attention has been paid to the debate on whether job creation is driven by small and micro-sized enterprises or of large sized enterprises (Bridge, O'Neill, Crombie, 2008; Steinhoff and Burgess, 1993; Thomas, 2000).

The small and micro-sized enterprises, despite creating less number of jobs, can absorb local resources, and the closure of small and medium-sized enterprises does not create many unemployed. This issue is also particularly important in a difficult and high unemployment situation, to understand which sectors or sub-sectors, and which size of enterprises should be supported to solve the problem of unemployment.

The evidence of some scarcity in research in the area of small and micro sized enterprises is, also demonstrated by the fact that the subsectors included in the value chain of tourism. By not 'deconstructing' the tourism sector, the similarities and differences between the subsectors of tourism, or between tourism and other subsectors of the economy are not analyzed (Smith, 2006).

The tourism sector includes in its value chain a set of subsectors, each one with some characteristics and specificities. It is essential to understand the inherent characteristics of each subsector in order to identify their similarities and differences, which will allow the correct application and definition of strategies for the tourism sector.

Specificities and Dynamics of Small and Micro-Sized Enterprises

The specificities and characteristics intrinsic to micro, small and medium sized enterprises

are gaining momentum and have become evident in the agenda of political discussion in recent years. It is fundamental to know the dynamics and characteristics of this type of enterprises to articulate and adapt the definition of policies and strategies for the dynamization and strengthening of the tourism sector (Costa, 2005; Nilson et al., 2005; Nordin, 2003; Phelps, 1996; Rogerson, 2007; Thomas, 1995; Thomas & Thomas, 2006).

As far as the tourism sector is concerned, micro, small and medium-sized enterprises account for a significant proportion of economic output, strengthen the regional and local economic base, while preserving the endogenous resources in the peripheral and island regions (Buhalis & Peters, 2006; Caniels, 2000; Danson, 1996; Haddad et al, 2011; Keilbach, 2000; Steinhoff & Burgess, 1993; Thomas 2000, Trembley & Wegner, 2009).

Research carried out in this area highlights the importance and preponderance of

micro, small and medium-sized enterprises, from an economic, social and territorial point of view (Audretsch, 1999; Buhalis & Peters, 2006; Jones & Tilley, 2003; Masschelein & Buyten, 2002; Milne & Ateljevic, 2001; Mouzas, 2006; Schumacher, 1973; Tyrrel & Johnston, 2006; Wanhill, 1996, 2000). For Buhalis & Peters (2006) micro, small and medium-sized enterprises present a number of advantages pointing out:

1. Promote regional development;
2. Drive innovation and growth by providing a continuous stream of new ideas,
3. concepts, products and resources;
4. Employ flexible specialization strategies to increase competitiveness;
5. Constitute the environment conducive to the learning of entrepreneurs;
6. Are more sensitive and receptive to market changes compared to large sized enterprises. Adapt and change rapidly because they do not have hierarchies;
7. Self-employment can reduce unemployment, particularly in social groups (e.g. ethnic minorities, young people with poor education, mid-career managers, unemployed women trying to enter the labor market after pregnancy);
8. Create clusters of value creation for regions and increase multiplier effects;
9. Most of the economic benefits generated by SMEs remain in the region rather than being 'exported';
10. Preserve local character and culture using local resources;
11. Owners/managers are self-motivated to survive by having higher incentives for hard and smart work.

These advantages offered by micro, small and medium-sized enterprises come from a set of characteristics and specificities that are inherent to it. Among these characteristics, the first is the ability of owners, considering the small size of the enterprise, to develop special and personal relationships with customers (Morrison, 1994; Morrison et al., 1999). This situation allows for greater loyalty, closeness and personalized service, meeting the specific needs of each client.

In addition, what micro, small and medium-sized enterprises may lack in terms of quality control and standardization can complement with flexibility, focus on niche markets and personalized services, going against the needs of each client. They also have the ability to use the local contacts and information to produce and distribute integrated services/products to individual customers. The product can be customized immediately, according to customer's requirements, providing a unique and personalized experience for each individual (Buhalis & Peters, 2006).

The flexibility and ability of small and micro-sized enterprises to occupy and developing niche markets is another area to keep in mind. This adaptation and flexibility allows for better adjustment and survival strategy for these enterprises in times of demand fluctuations (Burns, 2006; Hall, 1995; Geroski, 1995; Getz et al, 2004; Shumacher, 1973; Steinhoff & Burgess, 1993)

The importance of small and micro-sized enterprises to regional economies is also an important issue. The latest regional evidence in growth performance of smaller firms (Gudgin et al., 1989; Hart et al., 1993a; Hart, Harrison, & Gallaghn, 1993b) indicates that over a number of time periods there were significant differences in the ability of certain regions to generate sufficient numbers of successful small businesses. (Danson, 1996; Haddad et al., 2011; Keilbach, 2000)

One of the main issues addressed was to what extent the characteristics of the owner-manager can influence growth. The characteristics in question have been, broadly defined, as the educational background, professional experience and motivations of the principal decision-maker within the enterprise.

Growth is also very important due it can generate wealth and employment, being a topic of great interest to economists and policy makers. Growth of an enterprise is, clearly influenced by a set of factors. Some of these factors are external to enterprises and beyond the control of their owners and/or managers. Many of the external factors concern the economic, political and social environment, and are influenced by the government and/or public sector, where is included labor costs, costs of ownership, and targeted financial assistance for some areas (Holloway, 2002).

Concerning internal factors, Storey, in a comprehensive literature review on growth of small businesses, has broadened its influences on company growth. It concluded that the growth of small enterprises are, driven by the combination of three basic components: (1) The characteristics of the entrepreneur (owner-manager); (2) The characteristics of the small enterprise; (3) The range of business development (Storey, 1990).

METHODOLOGY

The methodology adopted will consider a descriptive analysis and the crossing of variables, which will allow to, identify two central areas of analysis, the territory, represented by NUT II variables; the size of enterprises considering the four dimensions, large, medium, small and micro-sized enterprises.

Based on the analysis performed and the areas of analysis identified, this chapter intends to investigate the relational structure of the variables under study, that is, to indicate which variables may be related to each other and which are not. A factorial analysis will be performed, since this analysis, according to Marôco, is an exploratory data analysis technique whose objective is to analyze the structure of a set of interrelated variables in order to construct a scale of measurement for factors that on some way control the original variables. (Marôco, 2010)

It is intended, with the factorial analysis to identify common factors that are not directly observable to represent and summarize the information present in the original variables, and it is fundamental to identify a small number of factors that allow us to adequately explain the phenomenon under study. This analysis will allow to, reduce the number of variables without changes in terms of the results obtained.

Taking into account the large number of investment projects under analysis, and in view of their diversity of territorial deployment, it is central to carry out an analysis that allows to, identify areas of the territory that are homogeneous in terms of investment dynamics, or in some way present one or more common characteristics.

In this sense, starting from the identification of the areas of analysis (territory and enterprise size), a cluster analysis will be carried out, based on all the numerical variables included in the total investment category, eligible investment, incentive and jobs to be created. This analysis considers the following categories, the territory, considering the NUT II variable, and the size of the enterprise, in its various dimensions of business.

According to Marôco (2010), the analysis of groups or clusters is an exploratory multivariate analysis technique that allows groups, or groups to be integrated into homogeneous groups with respect to one or more common characteristics. Each observation belonging to a particular cluster is similar to all others belonging to that cluster, and is different from the observations belonging to the other clusters.

Thus, the analysis of clusters performed in this section will start from the grouping of variables performed, in which the first group of variables considered is the territory, grouping the NUT II variable; the second refers to enterprise size, which encompasses the dimensions, micro enterprise, small enterprise, medium enterprise, and large enterprises.

It should be noted that, for each cluster analysis performed, having as a common base of analysis the investment values, would also be realized individual analysis of specific clusters considering each numerical variable. The aim of this analysis is to identify different groups of clusters and to observe if there are changes in groups depending on the numerical variable considered.

Another particularly important issue, and after defining clusters, is the inherent and specific characteristics of each cluster defined. It is considered important to obtain information on the main characteristics of each cluster in order to distinguish the different clusters, namely at the level of the numerical variables of the analysis (total investment, eligible investment, incentive and jobs to be created).

ANALYSIS AND DISCUSSION OF RESULTS

Location and Main Features of Tourism Investment at Regional Level

The analysis of the geographical location of investment projects carried out in the area of tourism in the period of II and III Community Support Framework constitutes a central area of analysis for this research. The geographic location of investment projects may derive from a set of issues, from the location of the enterprise (whether it is an investment in an infrastructure or equipment), the destination itself (emerging or consolidated destinations), or even the definition of investment priority areas in the financial instruments available. In addition, analyzing the areas where more investments are concentrated in the area of tourism can also give indications about the business dynamics in these areas and even the importance attributed to these destinations as investment areas in the tourism sector.

The geographical location of the investment projects takes into account the territorial division in Portugal according to the Resolution of the Council of Ministers no. 34/86 of May 5 that presents the first division by nomenclatures of territorial units (NUT), and in which the NUT II is constituted as the regional territorial division. The decision not to consider Decree-Law no. 244/2002 is due to the fact that the amendment was made during the third CSF and also taking into account attention to the logic of territorial division that exists at the moment with the linkage of the NUT II to the Regional Tourism Boards.

In order to demonstrate that the investments realized in the major tourist destinations are identical among them, and that they differ from the investments made in the areas of low tourist development, a cluster analysis is, carried out. This analysis makes it possible to group the investments made by NUT II. Subsequently, for each group of defined clusters a characterization of the retained clusters is made, which allows identifying and enumerating common characteristics to each cluster.

Table 1. Cluster por NUT II

NUTII_String

Cluster Number of Case			Frequency	Percent	Valid Percent	Cumulative Percent
1	Valid	N2_1	1	25,0	25,0	25,0
		N2_2	1	25,0	25,0	50,0
		N2_3	1	25,0	25,0	75,0
		N2_4	1	25,0	25,0	100,0
		Total	4	100,0	100,0	
2	Valid	N2_5	1	33,3	33,3	33,3
		N2_6	1	33,3	33,3	66,7
		N2_7	1	33,3	33,3	100,0
		Total	3	100,0	100,0	
3	Valid	N2_8	1	100,0	100,0	100,0
4	Valid	N2_9	1	100,0	100,0	100,0

The clusters' analysis according to the geographic location focuses its attention on the variables included in the territory group (nut_ii) based on the data analysis included in the investment group (inv_tot[1]; inv_eleg[2]; inctv[3]; p_trab[4]). In order to carry out this analysis, a transformation of the database was, carried out, since the one presented shows the data according to the number of investment projects, being transformed to present the data by municipality.

In practical terms, the subjects were no longer the investment projects, to be the municipalities where investments are realized in the tourism sector for the period of II and III Community Support Framework. With the sum of the various investment projects carried out in each municipality, divided by the number of projects carried out in each one, allows to obtain the average values of investment per municipality and per project.

Distribution and Main Characteristics of the Investment by NUT II

The role played by the regions and the importance they have been given, not only in terms of policy and investment but also in terms of growth and development has been reflected in a greater interest in terms of scientific research, as already observed. In fact, the regional structure can, and should play an important role in terms of growth and development of the countries, which will subsequently, be reflected, in an improvement in the living conditions of the populations.

Considering the investment projects, carried out in the period of the II and III Community Support Framework, it is fundamental to analyze the investment capacity demonstrated by the enterprises and/or entities per NUT II. This analysis will allow to identify areas that have a great dynamic and high investment capacity, as opposed to other areas that may still be in an incipient stage of development and present some weaknesses and structural difficulties in terms of their structure and business dynamics.

In this sense, based on available information, a cluster analysis is performed by NUT II. Considering the numerical variables under study, which allows the identification of group regions that demonstrate similarities in terms of investment, according to the variables total investment and eligible investment, incentive granted (based on the variable incentive) and on job creation, considering the variable jobs to be created. The NUT II cluster analysis integrates all NUT II regions (North, Centre, LVT, Alentejo, Algarve, Azores and Madeira) and the non-regionalizable and Multi territories. The initial analysis

Table 2. Clusters Analysis Matrix Synthesis by NUT II

ANÁLISE DE CLUSTERS - TIPO DE ANÁLISE							
id	conc	n_proj	all_variables	inv_total	inv_eleg	incentv	p_trab
1	NORTE	799	1	1	1	1	1
2	CENTRO	411	1	1	1	1	1
3	LVT	456	1	3	1	1	1
4	ALENTEJO	257	1	1	1	1	1
5	ALGARVE	212	2	3	2	2	2
6	AÇORES	86	2	2	2	2	2
7	MADEIRA	142	2	2	2	2	2

(Table 1) defined 4 clusters, having isolated two subjects, one in each cluster, dividing the remaining subjects by two clusters.

Cluster 1 integrates the NUT II regions of the North, Centre, LVT and Alentejo, cluster 2 adds the NUT II regions of the Algarve, Azores and Madeira. Cluster 3 isolates the non-regionalizable projects and cluster 4 the projects integrated in Multi territories. Taking into account the grouping of defined subjects, and considering the subjects Non-regionalizable and Multi territories as outliers, and based on the characteristics of the investment projects that integrate these items, it is recommended the withdrawal of both from the analysis. In this sense, it should be noted that all subsequent analyzes are performed not considering the two subjects, Non-regionalizable and Multi territories.

Concentration of Investment by NUT II

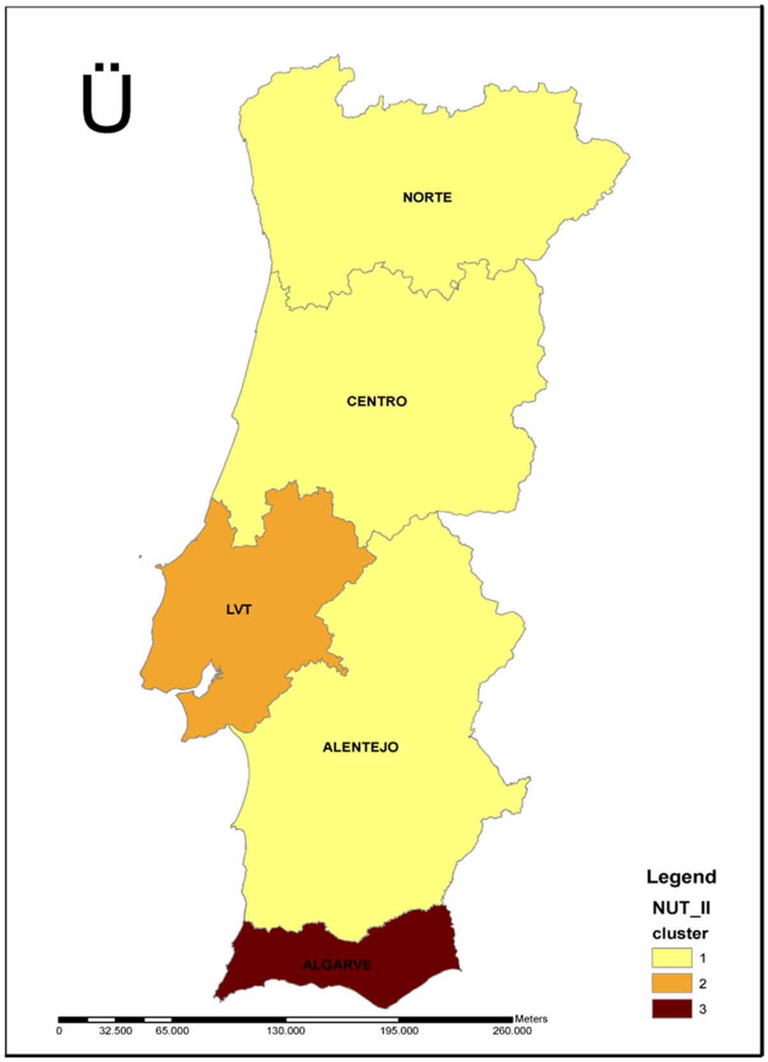
For each numerical variable, a cluster analysis was performed that defines a grouping of subjects (NUT II) based on the numerical variable in question. This individual analysis allows to identify similar performances between NUT II regions and to group them, and independently of the variable in question, it is possible to identify grouping of subjects that adopt a similar performance.

The detailed analysis of the synthesis matrix (Table 2) allowed the selection of 4 clusters of subjects that presented identical performance characteristics, and that independently of the variable in analysis are part of the same cluster. From this analysis is it possible to identify 3 groups of clusters shown in Figure 1.

It is observed that the NUT II regions of the North, Centre and Alentejo, regardless of the variable being considered, are always part of the same cluster, which shows similarities between NUT II regions in terms of investment capacity, incentive and job creation. Also, note the case of the NUT II regions of the Azores and Madeira. In fact, these regions, in addition, integrates the same cluster independently of the analysis, demonstrating similarities in terms of performance in the variables under study, also show a clear difference and distance between what are the links with the remaining NUT II of the continent, a situation that shows a clear difference in terms of investment, incentive and job creation. Thus, this research concludes that 'The NUT II regions of North, Centre and Alentejo have similar characteristics in terms of investment'.

The NUT II regions of LVT and the Algarve present some similarities with previous clusters, namely the NUT II region of LVT with the cluster that includes the NUT II regions of the North, Centre and Alentejo, and the NUT II region of the Algarve with the cluster, which integrates the regions of the Azores and Madeira. However, as can be seen in Table 3 in cluster analysis based on the variable total investment, these two regions (LVT and Algarve) form a single cluster, which reflects a greater proximity between these two regions in terms of investment, but clearly different regarding the variables eligible investment, incentive and jobs to be created.

Figure 1. Clusters by NUT II



According to data available (Table 3), which presents the synthesis matrix of clusters by NUT II, allows to conclude that the NUT II regions of North, Centre and Alentejo present similarities and always integrate the same cluster, independently of the variable under analysis. The same applies to the NUT II regions of the Azores and Madeira. In turn, the LVT and Algarve regions register different types of performance, depending on the variable in question. Although each region approaches in terms of the performance of different clusters, they integrate the same cluster during the analysis based on the total investment variable.

Table 3. Clusters by NUT II

CLUSTER POR NUT II			
designção cluster	1	2	3
cluster total	Norte Centro LVT Alentejo	Algarve Açores Madeira	
cluster inv_total	Norte Centro Alentejo	Açores Madeira	LVT Algarve
cluster inv_eleg	Norte Centro LVT Alentejo	Algarve Açores Madeira	
cluster inctv	Norte Centro LVT Alentejo	Algarve Açores Madeira	
cluster p_trab	Norte Centro LVT Alentejo	Algarve Açores Madeira	

Integrated Analysis of the Distribution of Investment by NUT II and its Main Characteristics

The previous section allows obtaining a synthesis of the investment by NUT II, having for this purpose a joint analysis to the several cluster analyzes carried out in an individualized and integrated way. At this point, its intended to draw conclusions from the integrated analysis, which includes all the variables (inv_total; inv_eleg; inctv; p_trab), for which a cluster analysis is performed, which will allow to observe how the several NUT II interact and create clusters.

The classification of the subjects under study is performed with hierarchical clusters, considering the Ward method using the square Euclidean distance as a measure of dissimilarity between subjects. As a decision criterion for the number of clusters to be retained, the criterion of R-Square was used, and the solution of the smallest number of clusters was chosen, which retained a considerable fraction (from 80%) of the total variance. The classification of each subject in the retained clusters was later refined with the non-hierarchical K-means method, see Table 4.

In order to identify the most important variables in the retained clusters, the statistical analysis of the ANOVA of the clusters was performed. The value of F allows to conclude that the variables average of inv_eleg, average of incentv and average of p_trab hold the greatest weight in the definition of

Table 4. ANOVA

ANOVA

	Cluster		Error			
	Mean Square	df	Mean Square	df	F	Sig.
Zscore: Média de inv_tot	1,068	1	,032	5	33,589	,002
Zscore: Média de inv_eleg	,926	1	,020	5	45,257	,001
Zscore: Média de incentv	,264	1	,006	5	44,653	,001
Zscore: Média de p_trab	,313	1	,007	5	44,255	,001

The F tests should be used only for descriptive purposes because the clusters have been chosen to maximize the differences among cases in different clusters. The observed significance levels are not corrected for this and thus cannot be interpreted as tests of the hypothesis that the cluster means are equal.

Table 5. Sum of Squares

ANOVA

		Sum of Squares	df	Mean Square	F	Sig.
Zscore: Média de inv_tot	Between Groups	1,068	1	1,068	33,589	,002
	Within Groups	,159	5	,032		
	Total	1,227	6			
Zscore: Média de inv_eleg	Between Groups	,926	1	,926	45,257	,001
	Within Groups	,102	5	,020		
	Total	1,028	6			
Zscore: Média de incentv	Between Groups	,264	1	,264	44,653	,001
	Within Groups	,030	5	,006		
	Total	,294	6			
Zscore: Média de p_trab	Between Groups	,313	1	,313	44,255	,001
	Within Groups	,035	5	,007		
	Total	,348	6			

clusters and the average variable of inv_tot is the one that holds the least importance in the definition of clusters. From this, it can be inferred that, for this specific analysis, the variables most important in defining the clusters are the variables average of eligible investment, average of incentive and average of jobs to be created, see Table 5.

According to the R-Square criterion, two clusters were retained that explain 88.7% (R-sq = 0.87746) of the total variance. The analysis of Table 6 shows that the first cluster integrates NUT II North, Centre, Lisbon and Vale do Tejo and Alentejo regions, and the second cluster is composed by NUT II regions of the Algarve, Azores and Madeira.

Cluster 1, which includes all the NUT II regions of the continent with the exception of the NUT II region of the Algarve, encompasses 1,923 projects, and has an average total investment of € 810,879.31, an average eligible investment of € 701,257.54, an average incentive of € 257,481.37 and an average job creation of 3.7.

This cluster registers an investment average that is clearly lower than cluster 2, a situation that is, objectively demonstrated through percentiles analysis. In this analysis, it is observed that 25% of the

Table 6. Clusters by NUT II

nut_ii

Cluster Number of Case			Frequency	Percent	Valid Percent	Cumulative Percent
1	Valid	Norte	1	25,0	25,0	25,0
		Centro	1	25,0	25,0	50,0
		LVT	1	25,0	25,0	75,0
		Alentejo	1	25,0	25,0	100,0
		Total	4	100,0	100,0	
2	Valid	Algarve	1	33,3	33,3	33,3
		Açores	1	33,3	33,3	66,7
		Madeira	1	33,3	33,3	100,0
		Total	3	100,0	100,0	

Table 7. Clusters Characterization by NUT II

CARACTERIZAÇÃO DOS CLUSTERS - NUT II - TODAS AS VARIÁVEIS									
CLUSTER	PROJETOS	CAE	VARIÁVEL	DESCRITIVAS			PERCENTIS		
n.º	n.º	id	nome	média	desvio padrão	mediana	25%	50%	75%
1	1923	Norte	investimento total	810.879,31	3.486.517,77	145.329,76	77.712,71	145.329,76	433.019,57
		Centro	investimento elegível	701.257,54	2.503.140,88	140.132,28	73.363,19	140.132,28	406.034,00
		LVT	incentivo	257.481,37	858.721,49	59.846,00	29.783,16	59.846,00	159.537,00
		Alentejo	postos trabalho a criar	3,70	14,01	-	-	-	3,00
2	440	Algarve	investimento total	2.427.981,69	5.100.239,59	589.372,00	134.544,50	589.372,00	2.421.529,12
		Açores	investimento elegível	2.194.569,28	4.596.750,01	554.932,61	129.019,07	554.932,61	2.308.782,15
		Madeira	incentivo	810.177,10	1.460.302,74	220.610,62	52.741,47	220.610,62	963.599,50
			postos trabalho a criar	9,48	24,04	-	-	-	8,75

projects inserted in cluster 1, have a total investment of less than € 80,000 and an incentive of less than € 30,000. Considering 50% of the projects, there is an increase in investment values, however, they do not exceed 150,000 € and corresponding to a maximum incentive close to 60,000 €, see Table 7.

Considering 75% of the projects, there is a reasonable increase in total investment (€ 433,019.57) and incentive (€ 159,537.00), however, those in cluster 2 are still 50% of investment projects. In terms of the number of jobs to be created, it should be noted that 75% of the investment projects integrated in this cluster are responsible for creating three jobs each, while 25% of the projects included in this cluster create a higher value of jobs.

Cluster 2 includes 440 investment projects in the NUT II regions of the Algarve, the Azores and Madeira. The average investment considered in this cluster are clearly higher than the values registered in cluster 1. The average of total investment is 2,427,981.69 €, of eligible investment 2,194,569.28 €, of incentive 810,177.10 and of job creation is 9.48. However, 25% of projects have a total investment value of less than € 135,000 and an incentive of less than € 55,000. From this it is inferred that the NUT II regions of the Algarve and Madeira have higher average investment values than the remaining NUT II regions.

However, when performing the analysis for 50% of the projects, it is observed that 220 have an investment of more than 590,000 € which represents an incentive of more than 220,000 €. For the percentile 75, which includes 330 projects, they register an investment of up to € 2,421,529.12. However, this fact also shows that 110 projects have a total investment higher than this value, which represents an incentive higher than 965,000 €, and a number of jobs created higher than 8.75.

The same situation occurs at the level of the variable eligible investment and incentive. The values recorded in cluster 2 (Algarve, Azores and Madeira) in each of the variables are always higher than the values recorded in cluster 1 for the same variables. For the eligible investment variable, the values presented in cluster 1 for the average and the standard deviation are respectively € 701,257.54 and € 2 503,140.88, while for cluster 2 are € 2,194,569.28 and € 4,596,750.01, respectively.

For the incentive variable, the average (€ 810,177.10) and the standard deviation (€ 1,460,302.74) recorded in cluster 2 are higher than the average value (€ 257,481.37) and the standard deviation (€ 858,721.49) observed in cluster 1. This situation also reflects a greater variability in the investment values executed in cluster 2, which integrates the NUT II of the Algarve, the Azores and Madeira.

The values of the average (9.48), and the standard deviation (24.04), recorded in cluster 2, are significantly higher than the values of the average (3.70) and the standard deviation (14,01), observed in cluster 1. Although in the factorial analysis, a high degree of dependence between the variables to be created and the variables directly related to the investment was not demonstrated.

The analysis carried out shows that the investment projects carried out in the NUT II North, Centre and Alentejo' regions show the lowest average investment values compared to the other NUT II' regions, average investment values and percentile analysis prove this.

SYNTHESIS AND CONCLUSION

The tourism sector is one of the main sectors of economic activity. Its economic, social and political importance is evidenced mainly by strengthening the regional and local economic base, balance of payments, stimulating economic growth and job creation. Given the importance of the tourism sector in economic and social terms, it is fundamental that the public sector create conditions for the growth and development of this sector.

The public sector plays a central role in tourism by defining policies and strategies that: (1) direct investment to less developed areas, but which have unique characteristics and specificities for their development; (2) leverage certain tourism sub-sectors to enable more income, more employment and greater multiplier effect; (3) supporting business structures that are more fragile and difficult to survive, but which demonstrate enormous potential for growth.

One of the central issues of this research concerns how public-sector policy and strategy measures can direct investment and leverage certain tourism or territorial subsectors or even economic activity such as employment. If the incentive allocated per project varies only according to the amount of total investment executed or the amount of eligible investment, the private sector will continue to invest in an isolated and undifferentiated way and without strategic orientation.

This investigation allows concluding that, in the period II and III Community Support Framework the amount of incentive allocated per project varies according to the amount of total investment and eligible investment. In other words, exists an interconnection and proportionality between the total investment amounts, of eligible investment and of incentive attributed by project, not being registered an increase of the incentive attributed with respect to the values of total investment and of eligible investment. Nor based on the definition of politics and strategy for the sector, or in the dynamization of territories with lower tourism development index or in the advantage of a particular subsector of tourism.

Since the tourism sector is a highly labor-intensive sector, and taking into account its representation in terms of employment in Portugal, it can be a strategic sector in the creation of jobs. However, what is observed is that there is no direct interconnection or proportionality between the investment values, the incentive granted and the number of jobs to be created. This is a particularly important issue, given that, as the tourism sector is a labor-intensive sector, it can function as a strategic sector in solving unemployment problems, if policy measures increases the incentive for investment projects to create more jobs.

The private tourism sector consists mainly of small and micro-sized enterprises, which are central elements in the creation of income and employment, in boosting the regional and local economic base, in increasing the competitiveness of destinations, in the preservation and dynamization of the endogenous resources of the communities where it is integrated. This research allows proving the specificities and characteristics inherent to small and micro-sized companies. These enterprises are considered to have a number of advantages, ranging from income and employment creation; strengthening the regional and local economic base; preservation of endogenous resources, among others; which show their importance in economic and social terms.

This research leads to the conclusion that small and micro-sized enterprises carry out most investment projects in the tourism sector, in the period of the II and III Community Support Framework, absorb most of the incentive, and are responsible for the creation of a larger number of jobs, compared to medium and large enterprises, which demonstrate a high investment capacity, which allows them to obtain a higher incentive value per project, also demonstrating a higher capacity to create jobs per project.

The NUT II data analysis, in relation to the geographical areas where the enterprises that invest in the tourism sector are concentrated, allows to conclude that the enterprises located outside the main tourist destinations in Portugal, region NUT II North, Centre, Alentejo and Azores, compete mainly for investment projects, are responsible for the execution of most investment projects and create the largest number of jobs.

This research also allows concluding that tourism enterprises located in the major tourist destinations in Portugal, Lisbon and Vale do Tejo (LVT), Algarve and Madeira, show a greater investment capacity and absorb most of the incentive, compared to NUT II (North, Centre, Alentejo and Azores Regions). Moreover, the investment projects carried out in the II and III Community Support Framework are mainly concentrated in the NUT II regions of the North, Centre and Lisbon and Vale do Tejo (LVT). It has been shown that the less developed tourism NUT II regions (North, Centre and Alentejo) carry out a greater number of investment projects compared to the major tourist NUT II regions, Algarve and Madeira.

The analysis by NUT II allows concluding that the NUT II regions of the North, Centre, Alentejo present similar characteristics in terms of investment. The investment projects carried out in these NUT II regions show the lowest average investment values (considering all variables) compared to the other NUT II regions, which include the Lisbon and Vale do Tejo, Algarve and Madeira regions.

The analysis of the territorial distribution of the investment in the tourism sector by size of enterprise allows concluding that small and micro sized enterprises carry out their investment projects mainly in the NUT II regions of the North and Centre. While micro-scale enterprises are carrying out their investment projects primarily in the North and Centre regions, and small-scale enterprises carrying out their investment projects mainly in the North, LVT and Centre regions. It is also concluded that small and micro-sized companies are responsible for the execution of more than 50% of the total projects carried out in each NUT II, and in some NUT II regions, they execute almost all the investment projects, as observed in the NUT II North and Centre region.

In conclusion, it is important to evaluate the public policy and the investment in the tourism sector, to understand the philosophy and objectives that guide the entire system (strategic policy) and the territorial and sectorial dynamics of tourism enterprises. Therefore, the tourism sector should not only create wealth in terms of investment, income and employment, being also essential for the qualification, diversification and improvement of the quality of the supply, allowing economic gains that can induce the improvement of quality of life of the local people and local development in general.

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ENDNOTES

1 **Inv_tot:** means total investment, including the elegible and non-elegible investment realized in one project.

2 **Inv_eleg:** means elegible investment, represents the elegible actions/investments taking in attention the framework of the incentive.

3 **Inctv:** means incentive obtained, grant for the investment.

4 **P_trab:** number of jobs created for each investment project.

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