

GeoJournal of Tourism and Geosites

Year XII

2019/ no. 3

vol. 26



Editura Universității din Oradea



GeoJournal of Tourism and Geosites

Oradea University Press

Editors in Chief:

Dorina Camelia ILIEȘ, University of Oradea, Romania
Wojciech RATKOWSKI, Gdansk University of Physical Education and Sport, Poland

Associate Editors:

Doriano CASTALDINI, University of Modena and Reggio Emilia, Italy
Olivier DEHOORNE, University of Antille and Guyanne, France

Technical Editors:

Ioana JOSAN, University of Oradea, Romania

Scientific Committee:

Janne AHTOLA, University of Turku, Finland
Irasema ALCANTARA AYALA, University of Mexico, Mexico
Alina BĂDULESCU, University of Oradea, Romania
Dan BĂLTEANU, Romanian Academy – Institut of Geography of Bucharest, Romania
Huhua CAO, University of Ottawa, Canada
Pompei COCEAN, “Babeș-Bolyai” University of Cluj-Napoca, Romania
Denes Lorant DAVID, Shakarim State University of Semey, Kazakhstan
Stefan DESZI, “Babeș-Bolyai” University of Cluj-Napoca, Romania
Ross DOWLING, Edith Cowan University, Australia
Brahim EL FASSKAOUI, University of Moulay Ismail, Meknes, Morocco
Alessandro GALLO, “Ca' Foscari” University of Venice, Italy
Michael C. HALL, University of Canterbury, New Zealand
Tutut HERAWAN, Technological University Yogyakarta, Indonesia
Thomas A. HOSE, University of Bristol, United Kingdom
Gábor KOZMA, University of Debrecen, Hungary
Zoltan KOVACS, University of Szeged, Hungary
Ioan IANOȘ, University of Bucharest, Romania
Corneliu IAȚU, “Al. I. Cuza” University of Iași, Romania
Alexandru ILIEȘ, University of Oradea, Romania
Alan A. LEW, Northern Arizona University, United States of America
Ionel MUNTELE, “Al. I. Cuza” University of Iași, Romania
Mario PANIZZA, University of Modena and Reggio Emilia, Italy
Elisa PASTORIZA, Universidad Nacional de Mardel Plata, Argentina
Christian ROGERSON, University of Johannesburg, South Africa
Emmanuel REYNARD, University of Laussane, Suisse
Maria Luisa RODRIGUEZ, University of Lisabona, Portugal
Jarkko SAARINEN, University of Oulu, Finland
Stanisław SAWCZYN, Gdansk University of Physical Education and Sport, Poland
Tang YA, Sichuan University, China
Luca ZARRILLI, “G. d'Annunzio” University of Pescara, Italy
Graciela Iris ZUPPA, National University Mar del Plata, Argentina
Dallen J. TIMOTHY, Arizona State University, United States of America
Jan WENDT, University of Gdansk, Poland
Krzysztof WIDAWSKI, University of Wrocław, Poland
Allan M. WILLIAMS, London Metropolitan University, United Kingdom

The Journal is issued under aegis and with financial support of:



University of Oradea, Romania
Department of Geography, Tourism and Territorial Planning
Territorial Studies and Analysis Centre
1 University St., 410087, Oradea, Romania



Gdansk University of Physical Education and Sport, Poland
Faculty of Tourism and Recreation
ul. Kazimierza Górskiego 1, 80-336 Gdańsk, Poland

GTG

GeoJournal of Tourism and Geosites

Year XII, no. 3, vol. 26

Oradea - Gdańsk
2019

PUBLICATION REQUIREMENTS OF ARTICLES IN THE GEOJOURNAL OF TOURISM AND GEOSITES

The Editorial Board goes through each article, which is then submitted to two referees' judgment. Names of referees are confidential to the Editorial Board. Authors may be asked to make revisions to their manuscript. If substantial revision is required manuscripts may be re-reviewed before a decision to accept/publish is made. Final acceptance of manuscripts for publication is at the discretion of the Editors.

Authors alone are responsible for the opinions expressed in their papers.

The GeoJournal of Tourism and Geosites
is indexed in:

SCOPUS: <http://www.scopus.com/>

GEOBASE: <https://www.elsevier.com/>

INDEX COPERNICUS: <http://journals.indexcopernicus.com/karta.php?action=masterlist&id=3947>
IC Value: **121.25** - 2018; **109.97** - 2017; **88.82** - 2016; **84.53** - 2015; **68.79** - 2014;
6.59 - 2013; 2012; **4.84** - 2011; **4.83** - 2010; **4.15** - 2009; **3.91** - 2008

Review accredited by **C.N.C.S.I.S.**, "C" Category http://vechi.cncsis.ro/cenaposs/2008/Arhiva/reviste_cat_C_o8.pdf

ULRICHSWEB – GLOBAL SERIALS DIRECTORY
http://www.ulrichsworld.com/ulrichsworld/ulrichsworld_news/uu/newTitles.asp?uuMonthlyFile=uu201003/new_titles.txt&Letter=G&navPage=9&

WORLDCAT: http://www.worldcat.org/search?q=GeoJournal+of+Tourism+and+Geosites&qt=owc_search

SCIPIO: <http://www.scipio.ro/web/geojournal-of-tourism-and-geosites>

EBSCO: <http://www.ebscohost.com/titleLists/hjh-subject.pdf>

HOSPITALITY & TOURISM COMPLETE: <https://www.ebscohost.com/titleLists/hjh-coverage.xls>

HOSPITALITY & TOURISM INDEX: <https://www.ebscohost.com/titleLists/hoh-coverage.htm>

CAB Abstracts: <https://www.cabi.org/SerialsCited/1429.txt>

ERIH PLUS: <https://dbh.nsd.uib.no/publiseringsskanaler/erihplus/periodical/info.action?id=495196>

DOAJ - DIRECTORY OF OPEN ACCESS JOURNALS: <https://doaj.org/search>

Price of journal:

Individual	10 €
Institutional	15 €
Annual subscription	20 €

Address of the Editorial Office:

University of Oradea Department of Geography,
Tourism and Territorial Planning/Territorial Studies and Analysis Centre 1 Universităţii St.,
410087, Oradea, Romania, Phone/fax: +40 259 408 475 e-mail: gtg.uoradea@yahoo.com

On line version:

<http://gtg.webhost.uoradea.ro>

C O N T E N T S

Christian M. ROGERSON, Jayne M. ROGERSON PUBLIC PROCUREMENT, STATE ASSETS AND INCLUSIVE TOURISM: SOUTH AFRICAN DEBATES DOI 10.30892/gtg.26301-389	686
Rosnidar SEMBIRING, Erna HERLINDA, Afrita AFRITA, Suria NINGSIH, Iskandar MUDA The Role of Dalihan Na Tolu in Enhancing the Tourism Appeal of Parbaba White Sand Beach in Samosir Regency as Indonesia's National Geopark DOI 10.30892/gtg.26302-390	701
Mauricio CARVACHE-FRANCO, Wilmer CARVACHE-FRANCO, Daniel CONTRERAS-MOSCOL, Luis ANDRADE-ALCIVAR, Orly CARVACHE-FRANCO Motivations and Satisfaction of Volunteer Tourism for the Development of a Destination DOI 10.30892/gtg.26303-391	714
Firdaus FIRDAUS, Nurus SHALIHIN, Dian Kurnia ANGGRETA, Faishal YASIN, Rio TUTRI Improving the Benefits of Karamba into Tourism Activities: An Effort to Reduce the Ecological Impact of Aquaculture in Maninjau Lake, Indonesia DOI 10.30892/gtg.26304-392	726
Dana Carmen MIHINȚĂU (MIHELE), Dorina Camelia ILIES, Yulia KOROLEVA, Grigore Vasile HERMAN The Study of Indoor Microclimate on Wooden Churches To Be Included Among Oradea's Representative Sights DOI 10.30892/gtg.26305-393	737
Munish AHLAWAT, Piyush SHARMA, Prashant Kumar GAUTAM Slow Food and Tourism Development: A Case Study of Slow Food Tourism in Uttarakhand, India DOI 10.30892/gtg.26306-394	751
Hakam SHATNAWI, Bashar Al NAJDAWI, Khaldoun KANAAN, Qusay KHALEEF AH, Mohammad KHASAWNEH Factors Affecting Customers' Behavior Towards Tipping Intentions in Jordanian Restaurants DOI 10.30892/gtg.26307-395	761
Peter Yu. MALKOV, Tatyana N. KURILENKO, Maria G. SUKHOVA, Olga V. ZHURAVLEVA, Alexander I. MINAEV Analysis of Anthropogenically Induced Changes in Ecosystem Components in the Katun Recreational Area of the Altai Republic, Russian Federation DOI 10.30892/gtg.26308-396	769
Ali NAJAFIFAR, Jafar HOSEINZADEH, Hamidreza MOJARADI-GILAN Providing a New Approach to Assessing Tourism Suitability in Iran (Case Study: Badareh City, Ilam Province, Zagros Region) DOI 10.30892/gtg.26309-397	780

Janice HEMMONSBHEY, Tembi M. TICHAAWA Strategic Planning of Sport Tourism Events on Destination Brands: Examining the Role of Home-Grown Sport DOI 10.30892/gtg. 26310-398	794
Jesús Claudio PÉREZ-GÁLVEZ, Tomás LÓPEZ-GUZMÁN, Miguel Jesús MEDINA-VIRUEL, Mónica TORRES-NARANJO Heritage Tourism in Ubeda y Baeza (Spain). World Heritage Reinassance Cities DOI 10.30892/gtg. 26311-399	808
Diane ABRAHAMAS Transformation of the Tourism Sector in South Africa: A Possible Growth Stimulant? DOI 10.30892/gtg. 26312-400	821
Sedat BÜTÜN, Sibel ÖNÇEL Comparative Content Analysis of the Websites of Gastronomy Cities Rewarded by Unesco Creative Cities Network DOI 10.30892/gtg. 26313-401	831
Paul Nkemngu ACHA-ANYI, Neliswa Nomkhosi DLAMINI Festival Tourism as an Instrument of Sustainable Livelihood in Eswatini DOI 10.30892/gtg. 26314-402	849
Rajeev Ranjan MISHRA, Piyush SHARMA, Sanjeev KUMAR A Study to Identify Talent Development Practices in the Hospitality Sector and its Impact on Organizational Performance DOI 10.30892/gtg. 26315-403	861
Javier JIMÉNEZ-BELTRÁN, Carol JARA-ALBA, Jaime ROLDAN NOGUERAS, Gema GOMEZ-CASERO Motivational Segmentation of the Gastronomic Tourist in the City of Córdoba (Spain) DOI 10.30892/gtg. 26316-404	874
Oleksandr KOROL, Tetiana SKUTAR Theoretical Approaches in the Research of Inbound Tourism: The Case of Bulgaria DOI 10.30892/gtg. 26317-405	887
Nasir YUSOFF, Norlyiana SAMSURI, Salahuddien AYOB, Faruque REZA Visualization of Malay Traditional Food: Emotional Expression of the Immigrants in Malaysia DOI 10.30892/gtg. 26318-406	905
Desire GREENBERG, Jayne M. ROGERSON The Serviced Apartment Sector in the Urban Global South: Evidence from Johannesburg, South Africa DOI 10.30892/gtg. 26319-407	916
Tracey McKAY, Lynsey McEWAN, Melissa BAKER The Rise of Trail Running in South Africa: Possibilities for Small-Scale Sports Tourism DOI 10.30892/gtg. 26320-408	930

Ka Leong CHONG

Review of Problems in the Development of Rail Tourism in Taiwan, on the Example of the Alishan Forest Railway

DOI 10.30892/gtg. 26321-409 943

Love Odion IDAHOSA

Understanding Sustainability, Corporate Social Responsibility and Responsible Tourism in Literature vs Practice

DOI 10.30892/gtg. 26322-410 956

Christian M. ROGERSON

Peripheral Tourism Trajectories: Evidence from the King Sabata Dalindyebo Municipality, South Africa

DOI 10.30892/gtg. 26323-411 974

Sandile L. MKHIZE, Milena IVANOVIC

The Revealing Case of Cultural Creatives as Transmodern Tourists in Soweto, South Africa

DOI 10.30892/gtg. 26324-412 993

Elizabeth Ann DU PREEZ

The Contribution of Geological Features to Visitor Experiences: Comparison Between Two Geotourism Attractions in South Africa

DOI 10.30892/gtg. 26325-413 1006

Snježana Musa, Dario Šakić

Military Brownfields – Potential for Tourist Revitalization in Bosnia and Herzegovina

DOI 10.30892/gtg. 26326-414 1021

Maria GÓRSKA-ZABIELSKA, Ryszard ZABIELSKI

Stone in an Urban Space – Its Potential to Promote Geotourism

DOI 10.30892/gtg. 26327-415 1033

Yerzhan N. SAGATBAYEV, Sergey V. PASHKOV, Alexander N. DUNETZ, Ordinbek B. MAZBAYEV

Landscapes of the Teniz-Korgalzhyn Depression: Evaluation of Ecosystem Functions and Opportunities for Tourism

DOI 10.30892/gtg. 26328-416 1046

Tuatul MAHFUD, PARDJONO, Badraningsih LASTARIWATI

Chef's Competency as a Key Element in Food Tourism Success: A Literature Review

DOI 10.30892/gtg. 26329-417 1057

Gebreslassie DANIEL ALEMSHET, Gebreyesus TEKLEBRHAN LEGESE

Religious Places as Tools for Adventure Tourism Development in Tigray, Ethiopia

DOI 10.30892/gtg. 26330-418 1072

Premangshu CHAKRABARTY, Sanjoy Kumar SADHUKHAN

Adventure Tourism Spectrum, Environment and Livelihood Opportunities: A case study in Southern Singalila Trekking Corridor of Indo-Nepal Border

DOI 10.30892/gtg. 26331-419 1092

PUBLIC PROCUREMENT, STATE ASSETS AND INCLUSIVE TOURISM: SOUTH AFRICAN DEBATES

Christian M. ROGERSON*

University of Johannesburg, School of Tourism and Hospitality, College of Business
and Economics, Bunting Road, Johannesburg, South Africa, e-mail: crogerson@uj.ac.za

Jayne M. ROGERSON

University of Johannesburg, School of Tourism and Hospitality, College of Business
and Economics, Bunting Road, Johannesburg, South Africa, e-mail: jayner@uj.ac.za

Citation: Rogerson C.M. & Rogerson J. M. (2019). PUBLIC PROCUREMENT, STATE ASSETS
AND INCLUSIVE TOURISM: SOUTH AFRICAN DEBATES. GeoJournal of Tourism and
Geosites, 26(3), 686–700. <https://doi.org/10.30892/gtg.26301-389>

Abstract: Inclusive tourism represents a concept which is attracting major interest in international literature and an increasing policy focus in South Africa. Public procurement is used in South Africa as a vehicle for supporting national development goals. Against the background of growing interest on the behalf of South Africa's national government to utilize public procurement for leveraging a more inclusive development path the aim is to direct attention to the potential application of public procurement as a vehicle for enhanced inclusion in the country's tourism sector. Three sections of discussion are presented. As essential context the first section reviews international debates around public procurement as a policy tool. The second section turns attention to ongoing South African debates and policy initiatives around the leveraging of public procurement. State assets are the focus in the third section and their use through public procurement as a potential policy vehicle for inclusive tourism development in South Africa. In terms of methodology the paper draws upon a critical analysis of international experience of procurement, a review and analysis of policy documents, and published and unpublished data on immovable state assets that can be applied potentially in using public procurement for inclusive tourism development in South Africa. The central argument is multiple opportunities exist for public procurement to lever state assets in support of the goals of inclusive tourism development in South Africa.

Key words: Inclusive tourism, public procurement, tourism policy, South Africa

* * * * *

INTRODUCTION

The concept of inclusive tourism currently is a major research focus in international tourism scholarship (Bakker & Messerli, 2017; Indriani et al., 2017; Biddulph, 2018; Campos et al., 2018; Scheyvens & Biddulph, 2018). It is a concept that is

* Corresponding author

also attracting mounting interest in South Africa (Butler & Rogerson, 2016; Bukula, 2018; Rogerson & Rogerson, 2019). At a major conference of tourism stakeholders during August 2015 the Minister of Tourism Derek Hanekom proclaimed that among key objectives of South Africa's future tourism policy in future was that "we want to make the entire sector more inclusive and representative by bringing people who have been marginalized into the mainstream tourism economy" (Hanekom, 2015: 2).

The theme of developing a more inclusive tourism sector has been re-iterated subsequently in several other government statements and documents. Most importantly, the achievement of "inclusive and quality growth of the South African tourism economy" is viewed as a foundation of the country's National Tourism Sector Strategy (Department of Tourism, 2018: 18). In this regard, of particular note was that in May 2017 the Minister of Tourism announced that state-owned assets and properties would be leveraged to support tourism SMMEs for inclusive tourism (Ensor, 2017). In addition, as part of its initiatives for inclusive tourism the Department of Tourism itself would 'walk the talk' through using the Department's own procurement budget in a deliberate move to support and promote black entrepreneurs. The term 'public procurement' "refers to the purchase of goods and services by government or public entities to fulfil their various functions" (Bolton, 2016: 4). The critical relevance of public procurement as a policy tool for achieving the goals of national government is underlined by commitments made in the National Development Plan (NDP) 2030 (The Presidency, 2011).

The NDP asserts that public procurement "will be an essential stimulator of demand for small and expanding firms" (The Presidency, 2011: 119). A recent World Bank (2018) diagnostic report on the South African economy identifies the application of public procurement as one of the policy tools currently applied to address what it calls the 'incomplete transition' following democratic change. It is against the backdrop of growing interest on the behalf of South Africa's national government to utilize public procurement for leveraging a more inclusive development path, including for the tourism sector, that the objective in this paper is to direct attention to the potential application of public procurement as a specific vehicle for enhanced inclusion in the country's tourism sector.

In terms of methodology the paper draws upon a critical analysis of international experience of procurement, a review and analysis of policy documents, and published and unpublished data on immovable state assets that can be applied potentially in using public procurement for inclusive tourism development in South Africa. Three sections of discussion are presented. As context the first section reviews international debates around public procurement as a policy tool. The second section turns attention to ongoing South African debates and policy initiatives around the leveraging of public procurement. The third section turns attention to state assets and directs attention to public procurement as a potential policy vehicle for inclusive tourism development in South Africa.

LEVERAGING STATE PROCUREMENT: THE INTERNATIONAL EXPERIENCE

As argued by Hoekman & Sanfilippo (2018: 1) governments around the world purchase a large variety of products from the private sector and such state procurement often accounts for "a significant share of GDP and thus aggregate demand". According to the UNEP (2017: viii) public procurement wields enormous power, accounting for an average of 12% GDP in the group of OECD countries and reaching as much as 30% in many developing countries. In countries of the global South Wittig (1999: 3) identifies the public procurement sector as "often the largest domestic market". Likewise, Hoekman & Sanfilippo (2018) confirm that in some of the poorest regions of the world, including sub-Saharan Africa, the magnitude of public procurement is highly significant in configuring

the economic landscape. Conventionally state procurement systems incorporate procedures to ensure that contracts are awarded to the lowest cost suppliers that satisfy particular technical specifications. This said, in most countries value for money is not the only goal of public procurement as many governments also have leveraged state procurement in order to pursue other social or distributional objectives (Nijaki & Worrel, 2012; Flynn & Davis, 2015; UNEP, 2017; Loader, 2018).

The use of public procurement to drive innovation is a strong focus particularly in the European Union where “the purchasing power of governments is being recognised as a demand-side tool that can stimulate innovation” (Bolton, 2016: 4). Most recently, the application of public procurement has been extended to achieve environmental objectives with much attention devoted to issues of ‘green procurement’ or sustainable procurement in which SMMEs are a major priority for target support (Nijaki & Worrel, 2012; UNEP, 2017; Delmonico et al., 2018). Low carbon procurement is also a new research agenda – particularly in Europe – as a response to the importance of addressing climate change issues (Correia et al., 2013). Overall, across the international scholarship among key barriers identified to successful procurement are that “often people do not see public procurement as strategic or even a real profession”, “competing procurement priorities”, “lack of awareness” and in the developing world “lack of products or services to procure” (UNEP, 2017). In emerging economies questions around sustainable public procurement have attracted academic attention with work suggesting that “organizational culture stands out as a particular barrier” (Delmonico et al., 2018: 70).

Across the region of sub-Saharan Africa there is a growing literature on issues around public procurement (African Procurement Law Unit, 2018). Most existing African literature focuses on issues of governance, legal issues, reduction of corruption, the development of enhanced institutional and management frameworks and firm performance (eg. Quinot & Arrowsmith, 2013; Williams-Elegbe, 2013; Leon de Mariz et al., 2014; Uromi, 2014; Williams-Elegbe, 2015; Ambaw & Telgan, 2017; Engelbert et al., 2016; Engelbert, 2017; African Procurement Law Unit, 2018; Hoekman & Sanfilippo, 2018). Beyond these studies, one must note Akenroye et al. (2013) on the implementation of green public procurement in Nigeria, Mphela & Shunda (2018) on the challenges for SMMEs to engage with public procurement in Botswana, Israel & Gazungu (2019) on procurement and SMMEs in Tanzania, and, Amoah & Shakantu (2017) on public procurement preferences in Ghana in support of the local construction industry. African research which examines issues of public procurement and social inclusion include works by Bolton (2006, 2008a) on South Africa and most recently by Basheka (2018) on Uganda.

Notwithstanding policy interest in many advanced and emerging economies for leveraging public procurement it is observed that public procurement remains a relatively neglected theme for academic research (Thai, 2001; Mahmood, 2010). Most especially attention has lagged in respect of how it can be utilised to promote entrepreneurship (Preuss, 2011). Nevertheless, as discussed below, public sector procurement has been applied as a lever for SMME development in several countries to catalyse market access for certain preferred groups of SMMEs, an initiative which emerges out of a longer history of leveraging state procurement. Historically, it is argued that the application of “public procurement as a tool to advance national priorities can be traced back to the 19th century when procurement was used to tackle social justice issues such as fair labour conditions and wages or improved opportunities for disabled people”(UNEP, 2017: 10). McCrudden (2004) provides a valuable overview of how governments attempt to use procurement to produce desired social outcomes regulating the use of its purchasing power to advance conceptions of social justice. Indeed, it is suggested that at least in the global North “modern procurement systems evolved alongside the development of the welfare State,

and it is hardly surprising that the former was used in part to underpin the goals of the latter” (McCrudden, 2004: 258). For example, in the United Kingdom after World War 1 public procurement was applied to address the needs of disabled ex-servicemen with the establishment of sheltered workshops where limited types of goods were made and given preference in government purchasing. In the USA similar initiatives were introduced during the 1930s to support the blind. Such early initiatives to leverage the power of public procurement extended in scope and in geographical context (McCrudden, 2004).

In the international scholarship around public procurement much interest centres on the United States experience of affirmative action programmes in which conditions were attached to government contractors for non-discrimination practices. Provisions were enacted to ensure through ‘set-asides’ such that a determined proportion of government contracts be secured by black owned businesses “in an attempt to further the development of an entrepreneurial black middle class” (McCrudden, 2004: 260). Indeed, the most striking application of set asides has been to nurture the development of “minority businesses” (mainly African-American owned enterprises) in the USA; later the focus of these programmes expanded to include other minority groups (especially Hispanics) as well as women-owned businesses (Sonfield 2010). By the 1960s these programmes were extended “to ensure that businesses owned by women would also secure a proportion of government contracts” (McCrudden, 2004: 261).

The core legislative thrust was designed “to promote equality and social cohesion through a policy of ‘affirmative action’ by having ‘set asides’ for socially and economically disadvantaged owners of small businesses” (Centre for Research in Ethnic Minority Entrepreneurship, 2007: 9). For Preuss (2011: 790) the focus of these programmes “is to counteract social exclusion through support for women- and minority-owned enterprises”. Arguably whilst the USA enjoys a long history of set aside programmes which can be traced back even as far as the 1930s (House-Soremekun, 2007: 20), the most important developments occurred in the 1960s and 1970s. In the USA the ‘small business set aside’ is widely used to support market access for small business. It restricts or sets aside certain contracts exclusively for small business participation. Under the Small Business Set-Aside Program US small businesses are assisted to win government contracts. More explicitly, the programme assures small businesses are awarded a ‘fair proportion’ of government contracts through reserving certain purchases exclusively for small business suppliers (House-Soremekun, 2007).

The leveraging principle of public procurement to support disadvantaged groups in the USA has been extended and replicated in several other countries. In the United Kingdom during the 1960s legislation was introduced to support ethnic minority businesses (mainly by Asian immigrants) through public procurement (Ram & Smallbone, 2003). Loader (2018) identifies a continuing emphasis in the UK experience of applying public procurement policy to assist SMEs especially in the period 2010-2015. Also, in Canada set-asides are used in certain government contracts with mandatory provisions for Aboriginal suppliers through an Aboriginal business procurement policy (Orser 2009). Instead of relying on procurement goals or targets which relate to small business sourcing, often from disadvantaged groups in Canada “set-asides reserve certain purchases for competition only among a certain group of disadvantaged owners of SMEs” (Orser, 2009: iii). In the case of Malaysia public procurement was strategically applied to assist the develop of native Malays (*Bumiputeras*) through according a margin of price preference over a reference price for government contracts (McCrudden, 2004).

A 2006 law in Brazil grants set asides to small businesses and gives priority to small businesses on purchases under a cost limit of 80 000 reais (Timm, 2015). In India procurement rules stipulate that certain products are ‘set aside’ and must be purchased

exclusively from the small-scale sector in order to support artisans and small-scale firms even if prices charged are up to 15% higher than those offered by competitors (McCrudden, 2004). During 2015 India enacted a policy that obliges state-owned enterprises and departments of central governments to source 20 % of goods and services from small enterprises (Timm, 2015). The following section turns to the South African record and broad debates about leveraging public procurement.

LEVERAGING PUBLIC PROCUREMENT IN SOUTH AFRICA

According to McCrudden (2004) in its changed policies relating to procurement post-1994 South Africa borrowed extensively from the policy experience of both Canada and Malaysia. Bolton (2006: 193) makes clear that prior to the democratic transition in 1994 the government procurement system in South Africa favoured large and established businesses and created an environment in which it was very difficult for small enterprises to enter the procurement system. In 1994, however, government procurement was granted constitutional status and acknowledged as a vehicle for addressing past discriminatory practices (Bolton, 2008a, 2008 b). Public procurement has been applied since 1994 as a policy tool “to correct South Africa’s history” (Bolton, 2006: 202) and “address past apartheid injustices” (Bolton, 2016: 10). Of critical importance has been that in procuring goods and services, organs of the South African government are required to take into account a number of factors when awarding state contracts.

As Bolton (2006: 202) stresses the concept of “empowerment” “plays an important role in determining whether or not a contract is awarded to a particular contractor”. Provision is made for the implementation of a policy of what is described as “affirmative” or “targeted” procurement which is aimed “at providing employment and business opportunities for marginalized individuals and communities – referred to as ‘target groups’” (Bolton, 2008a: 2). Since 2000 much progress has been made to establish a supportive policy and legislative environment for preferential procurement with the implementation of a number of policies beginning with the 2000 Preferential Procurement Policy Framework Act (PPFA) (Rogerson, 2004). South Africa is observed as one “of few countries in the world to have procurement subject to its Constitution” (Herrington & Overmeyer, 2006: 9). According to Bolton (2016) the key legislation provisions of the PPFA and Regulations provide a national framework for the roll out and implementation of preferential procurement policies in South Africa.

In addition to the policy focus on Black Economic Empowerment, growing interest centred on using public procurement as a strategic tool to support the objectives of policies for the development of small, medium and micro-enterprises (SMMEs) (Osiba Research, 2011). Arguably, SMME development promotion through public procurement can contribute also to achieving the goals of pro-poor local economic development in South Africa (Rogerson, 2014). One recent report asserted that “South Africa could vamp up support to small businesses if it looked at setting aside certain types of procurement for SMEs, as a number of countries like South Korea, the US and Japan already do” (Timm, 2011: 43). This said, the possible use of public procurement to support SMME development has been under discussion for several years in South Africa. In 1994 a report was submitted on the contribution of “emerging enterprises” to both public and private sector procurement programmes. This report was authored jointly by the World Bank and a South African reference group on small business development convened by the Ministry of Trade and Industry (The Reference Group on Small Business Development and the World Bank, 1994). Thus as far back as 1995, procurement reform began and focused on good governance in procurement and the attainment of socio-economic objectives through procurement, including SMME development (Rogerson, 2004). During 1995

national government adopted a Ten Point Plan to furnish SMMEs with opportunities to participate in government procurement thereby offering them a range of new markets for their goods and services. This particular initiative was followed up in 1997 by the production of a handbook of procurement guidelines for SMMEs and service providers relating to markets in the state sector (Ntsika, 1997).

The appearance of these various reports following democratic transition demonstrates that the basic issues around creating market opportunities for SMMEs through public procurement are not new in South African policy debates (Rogerson, 2004a). In 2005 following the presentation of the Integrated Small Enterprise Development Strategy, the official framework for small business development policy in South Africa, Cabinet proposed that government implement a procurement programme that gave effect to the procurement of specified 10 products from all government departments and state agencies (Department of Trade and Industry, 2006).

Cabinet proposed that the Department of Trade and Industry (DTI) jointly with National Treasury identify the ten products to be recommended as suitable for this programme and further prepare recommendations on procurement, reporting and monitoring measures designed to ensure that proper guidelines are in place for implementation of this programme as a government wide strategy to expand market access to SMMEs utilizing government procurement opportunities (DTI, no date). A DTI-National Treasury Task Team completed an analysis of government procurement trends using a sample of departments and government procurement related research material. The outcome was the identification of ten products for government procurement from small enterprises which was presented in a Cabinet memorandum which was approved by Cabinet in November 2007. Under the approved "Ten Products Initiative" government would only procure certain products from (black) SMMEs. The Government Preferential Procurement for Small Enterprise Products and Services isolated ten product and service categories to be supplied by SMMEs (Kaiser Associates, 2010).

The ten identified product categories considered as targets for SMMEs were advertising, media and communication; interior and exterior cleaning services and cleaning product supplies; clothing and textiles; computer equipment and consumable supplies; interior and exterior furniture and décor; events coordination and management; maintenance and repairs, construction, office space, furniture and vehicle body works; travel coordination and shuttle services; food perishable supplies (catering); and, stationary supplies and printing (Kaiser Associates, 2010). Implementation of this initiative, however, was stalled such that whilst government was encouraging (and increasingly compelling) the private sector through B-BBEE codes to expand linkages with black-owned enterprises it has not been practicing this in its own direct procurement. As is made clear by Mesatywa (2011) the strength of National Treasury in inter-departmental decision-making around procurement policy is extremely powerful. The practice is that "organs of the state follow National Treasury prescripts" with the consequence that the B-BBEE Act has largely been unused in state procurement (Mesatywa, 2011: 9). Current support directions were linked therefore to the implementation of the Preferential Procurement Act which gives "preference" in tenders to black suppliers. Other initiatives surrounded establishment of a National Procurement Portal. The intention of this initiative is to address poor access to markets by creating a platform which will host all procurement/tender opportunities of government departments (Breytenbach, 2011). In addition, it would do the following.

First, is to improve information accessibility on opportunities to suppliers, and information to buyers so as to increase the participation of small enterprises in public sector tendering and in requests for quotation. Second, is to streamline procurement

processes in order to reduce administrative burden for SMMEs. Three, is support for collaboration between the public and private sector on information on opportunities. Four, is to enhance adherence to timings/deadlines on contract advertisement, award, delivery and payment cycles. Last, is to strengthen information access and transparency of government procurement processes (Breytenbach, 2011).

Overall, however, it is pointed out that whilst the national government in South Africa is the champion of B-BBEE policy as well as SMME development and the largest procurer of goods and services in the country, examination of its own procurement spend and procedures suggests that it is often not supporting its own policies by its practices (Herrington & Overmeyer, 2006: 25). Critically, it is revealed that government spending not only has been insufficient on preferential procurement but also and most especially so in respect of its contribution to (black) small enterprise development. Further criticism are directed at national government for raising expectations that market access for SMMEs through government's own initiatives would be improved but then failing to implement promised policies and procedures that already were announced.

One recent detailed report on public procurement in South Africa contains several critical policy findings relating to SMMEs (Kaiser Associates, 2010). In particular, concern was expressed that the current direction of "preferential procurement legislation is shifting toward BBBEE enterprises, and away from SMMEs" (Kaiser Associates, 2010: 9). As a whole, this shift was reflected in the emphasis given to B-BBEE points in the procurement regulations which were gazetted in June 2011 which sought to align the B-BBEE policy with the Public Procurement Policy Framework Act (Mesatywa, 2011). From the perspective of National Treasury, the outcome of these regulations was that public procurement in South Africa must be directed by *preferences* to be given to SMMEs rather than through use of set-asides.

A new chapter opened in 2011 with the publication of the revised Preferential Procurement Regulations. According to the National Treasury (2017) this was influenced by the need to provide a mechanism to empower through procurement certain defined categories of SMMEs also classified as Exempt Micro Enterprises (EMEs) or Qualifying Small Enterprises (QSEs), Cooperatives, Townships and Rural Enterprises¹. The backdrop was that this was an outcome of social dialogue on the New Growth Path wherein government and social partners signed a Local Procurement Accord on 31 October 2011 which solidified a government commitment to leverage public procurement. The 2011 revised regulations were aligned also to the pronouncements made in the 2015 State of the Nation Address made by President Zuma (National Treasury, 2017). Specifically, it was announced that government would 'set-aside' 30 % of state procurement for certain defined categories of state enterprises (Timm, 2015; Bolton, 2016). As a consequence, the National Treasury began an engagement process with the Department of Small Business Development to craft a 'practice note' governing set asides and thus reverse its previous block on DTI initiatives which sought to ensure that the state buy 85 % of the 10 designated categories of goods and services from small businesses (Timm, 2015).

In February 2015 the National Treasury published a procurement review document which signaled its potential greater acceptance of the use of set asides. It stated that measures to promote preference and socio-economic transformation "would be conditional on these being able to keep cost premiums to a minimum and being aligned to Section 217 (1) of the constitution" which reads state procurement is conditional on a

¹ In terms of BBBEE legislation EMEs are the smallest entities with an annual turnover of R10 million or less. QSEs are those with an annual turnover of between R10 million and R50 million. Beyond these two categories are Generic Enterprises or GENs which are the largest enterprises with an annual turnover exceeding R50 million.

system that is “fair, equitable, transparent, competitive and cost-effective” (Timm, 2015). The World Bank (2018: 69) cautions that for South Africa the absence of sunset clauses in the set aside legislation means that “firms may never achieve competitive levels outside of government procurement” and thus might “remain dependent on government at the expense of the taxpayer”. It was reported that substantial pressure was brought by the lobbying undertaken by the Black Business Council for National Treasury to drop its opposition to set-asides and further amend the regulations in the Preferential Procurement Policy (Ntingi, 2016). On 20 January 2017 the National Treasury gazetted the revised Preferential Procurement Regulations making these the second round of revisions since their initial promulgation in 2001 (National Treasury, 2017).

According to the World Bank (2018: 71) the revised public procurement regulations which will establish the Office of the Chief Procurement Officer “to provide for an agile system of preference that will support socioeconomic transformation”. The revised regulations include the provision that organs of the state be required “to identify tenders, where it is feasible, to sub-contract a minimum of 30% of the value of the contract for contracts above R30 million” for supporting SMME development (National Treasury, 2017). More specifically, the legislation is directly targeted to those categories of SMMEs as defined in terms of the Broad-Based Black Economic Empowerment as either EMEs or QSEs (National Treasury, 2017). The specific details as set out below are that a tenderer must subcontract a minimum of 30% of the value of the contract to:

- (a) an EME or QSE;
- (b) an EME or QSE which is at least 51% owned by black people;
- (c) an EME or QSE which is at least 51% owned by black people who are youth;
- (d) an EME or QSE which is at least 51% owned by black people who are women;
- (e) an EME or QSE which is at least 51% owned by black people with disabilities;
- (f) an EME or QSE which is at least 51% owned by black people living in rural or underdeveloped areas or townships;
- (g) a cooperative which is at least 51% owned by black people;
- (h) an EME or QSE which is at least 51% owned by black people who are military veterans; or
- (i) more than one of the categories referred to in paragraphs (a) to (h) (National Treasury, 2017).

In the framework agreement of the 2018 Presidential Jobs Summit the leveraging of public procurement was isolated as critical for SMME development. It was stated that whilst “some progress has been made in leveraging Government procurement for SMME growth, much more still needs to be done to achieve the maximum impact of this policy” (Republic of South Africa, 2018: 46).

Key areas for policy attention include increasing awareness campaigns targeted at procurement officials to ensure implementation of the policy and strengthening the reporting and monitoring of information in order to enable the improved and effective tracking of the 30 percent set aside (Republic of South Africa, 2018). During 2018 the National Treasury recorded the abuse in certain provinces and municipalities of the requirement that 30 percent of public procurement contracts be subcontracted to designated groups in terms of the 2017 Preferential Procurement Regulations.

It was alleged “that some people are now demanding that they, instead, be paid in cash 30% of the value of each contract awarded in these provinces and municipalities” and failing that payment “they threaten contractors, interrupt or stop the implementation of projects” (National Treasury, 2018: 1). In addition, the National Treasury draws attention also to certain practices in terms of procurement preferences that are not provided for in terms of the existing regulatory framework.

Of note in particular, is that existing regulations seemingly do not permit geographical area preferences. The National Treasury (2018: 1) states that irregular practices include “the ring fencing of procurement for service providers and suppliers who live within certain geographical areas”. It is made clear that government funds “spent on tenders awarded in this manner will be classed as irregular expenditure since they do not comply with the Supply Chain Management and Preferential Procurement Provisions and prescripts” (National Treasury, 2018: 1). The 2017 Preferential Procurement Regulations were introduced as a temporary measure and will be superseded by the new Public Procurement Bill which was due to be ready in late 2018. From the perspective of the World Bank (2018: 91) the existing procurement policy framework exhibits “very complex overlapping objectives” which “are often competing, and they remain difficult to implement and measure”. The forthcoming Bill is set to repeal the Preferential Procurement Policy Framework Act in its entirety. For the National Treasury (2018) the Bill will consolidate various laws which currently deal with procurement and enable government to more effectively use public procurement as a strategic lever for inclusive growth objectives (Ensor, 2018). According to the Department of Small Business Development (2018: 15) once it is enacted this “will be the single national regulatory framework for public procurement” in South Africa. Potentially, according to national Treasury, the bill “will give provinces the flexibility to determine their own transformation and empowerment strategies and programmes based on their local economic development needs within the broader national framework” (Ensor, 2018: 1).

NEW PUBLIC PROCUREMENT AND TOURISM IN SOUTH AFRICA

The new public procurement measures in South Africa were informed by the ongoing policy narrative concerning inclusive growth. According to the responsible Minister the measures were applied “to use public procurement as a lever to promote socio-economic transformation, empowerment of small enterprises, rural and township enterprises, designated groups and promotion of local industrial development” (National Treasury, 2017). Although no explicit mention was given to tourism the regulations open up the possibility of extending the leveraging of public procurement into South Africa’s tourism economy. This said, as is demonstrated in the above discussion there exists an extensive body of international evidence for using public procurement for the support of national development goals and including of objectives surrounding SMME development. Indeed, it was shown through the international record that public procurement can be a useful tool to be applied to achieving a range of different development goals. Nevertheless, within extant international literature Hjalager (2002) points out there has been almost no discussion of the application of public procurement to support specifically tourism businesses. Arguably, this assessment which was made about the tourism sector in the early 2000s remains valid nearly two decades later.

In South Africa, however, there is an awakening of policy interest to the extended application of public procurement as a means for achieving a greater inclusive tourism sector to address existing lack of inclusivity (Rogerson & Rogerson, 2019). This interest builds upon the national government’s commitment to expand the involvement of black entrepreneurs in the country’s SMME economy and especially the country’s growing tourism sector (Rogerson, 2005). For more than a decade there has been an existing commitment in South Africa in terms of national government’s policies relating to the management of immovable assets that public assets be used optimally to support attainment of government objectives including poverty alleviation, job creation and black economic empowerment (Department of Public Works, 2005, 2008). Implementation of this policy, however, has been slowed by the absence of a comprehensive register of such

state assets. The country's Department of Small Business Development is leading a national initiative to integrate the small business support activities of several government departments in South Africa including of the Department of Tourism (Department of Small Business Development, 2018). It stresses that one of the key interventions for promoting SMMEs is through the strengthening of government public procurement programmes for leveraging improved market access for local SMMEs. As one of the participants in the National Interdepartmental Committee which is responsible for these interventions, the Department of Tourism has an important role especially in light of the significance of SMMEs in South Africa's tourism economy as well as potential for further development (Rogerson, 2005). During 2017 South Africa's Department of Tourism signalled that policy consideration was being given to leverage the opportunities of state-owned assets for tourism development and in particular for SMME upgrading by black entrepreneurs (Ensor, 2017). An initial step towards achieving this objective is the pursuit by the Department of Tourism of a national audit of such state tourism-related assets. Arguably, the extent of government assets that can be leveraged through public procurement regulations is considerable. The state apparatus in South Africa consists of three tiers of government – national, provincial and local. At each respective tier there exist a suite of important assets that can be leveraged for a more inclusive tourism development.

Table 1. State Assets for Leveraging Tourism Development: SANParks (Source: Authors. Note: Gemsbok National Park and Richtersveld National Park are now incorporated as part of two Transfrontier National Parks)

Name	Province	Established	Size (sqkm)
Addo Elephant Park	Eastern Cape	1931	1642
Agulhas National Park	Western Cape	1998	56.9
Augrabies Falls National Park	Northern Cape	1966	417
Bontebok National Park	Western Cape	1931	27.9
Camdeboo National Park	Eastern Cape	2005; 1979 as Karoo Nature Reserve	194
Garden Route National Park	Western Cape	2009; 1964 as Tsitsikamma National Park; 1985 as Wilderness National Park, Knysna National Lake Area	1570
Gemsbok National Park	Northern Cape	1931	9591
Golden Gate National Park	Free State	1963	116
Karoo National Park	Western Cape	1979	831
Kruger National Park	Limpopo and Mpumalanga	1926	19623
Mapungubwe National Park	Limpopo	1995	53.6
Marakele National Park	Limpopo	1994	507
Mokala National Park	Northern Cape	2007	196
Mountain Zebra National Park	Eastern Cape	1937	284
Namaqua National Park	Northern Cape	1999	1350
Richtersveld National Park	Northern Cape	1991	1624
Table Mountain National Park	Western Cape	1998	243
Tankwa Karoo National Park	Northern Cape	1986	1216
West Coast National Park	Western Cape	1985	363

At the national and provincial scale of government the 'jewels in the crown' of state assets are the network of game reserves – many of them 'big 5' wildlife attractions – as well as an array of smaller protected areas which are important for biodiversity conservation. At the apex of the management of significant state assets for tourism development is South African National Parks (SANParks) an organization formed in 1926 with responsibility for managing 22 different parks (19 functional) consisting of over 4 million hectares or roughly 3 percent of the total area of South Africa. The list of national parks shows their different areal extent, varying dates of establishment and size variations. Among the rich assets under the administration of SANParks are some of South Africa's most iconic attractions for both international as well as domestic tourists,

namely Kruger Park, Table Mountain National Park, Garden Route National Park and Addo Elephant Park. SANParks assumes a major role in promoting nature-based tourism or ecotourism businesses across the country. Beyond the wilderness protected areas under the management of SANParks there are other significant nature tourism assets which fall under the responsibility of provincial authorities in South Africa. For the province of KwaZulu-Natal the Ezemvelo KZN Wildlife (formerly Natal Parks Board) is responsible for maintaining wildlife and conservation at several major parks including most notably at the UNESCO World Heritage Sites of iSimangaliso Wetland Park and the Natal Drakensberg Park, the latter part of the Maloti-Drakensberg Transfrontier Conservation Area (Van der Merwe, 2019). CapeNature (officially the Western Cape Nature Conservation Board) manages 25 wilderness areas and public nature reserves across Western Cape Province. In North West province a key institutional actor is North West Parks Board. This organisation includes amongst its assets the Pilanesberg Game Reserve which is an expanding tourism node because of its accessibility only 50 kms from the Sun City gambling and leisure mega-resort and two hour drive from Johannesburg or Pretoria. Other provincial organisations which manage assets for nature-based tourism or ecotourism include Eastern Cape Parks, the Mpumalanga Tourism and Parks Agency and the Gauteng Department of Agriculture and Rural Development.

Table 2. State Assets by Category: Western Cape
(Source: Unpublished Department of Tourism Database)

Type of Asset	Number
Nature reserve	28
Holiday resorts	22
Camping or Caravan Park	15
Museum	7
Heritage site	7
Botanical or Nature Garden	6
Harbours	5
Beach	5
Visitor Centre	5
Historic view site	1
Research Conservation Centre	1
Cultural Centre	1
Community farm	1
Hiking trail	1
Lighthouse	1

Notes; (1) Data base reflects reporting municipalities only, (2) Category of holiday resorts also includes several which offer camping and caravan sites, (3) Several nature reserves offer various forms of accommodation

All these national or provincial agencies are subject to compliance with national and/or (aligned) provincial government procurement regulations and therefore have assets that can be, to varying degrees, leveraged for supporting the involvement of black SMMEs either in tourism activities directly or as suppliers in supply chains to these organisations and their related activities including, in some instances, also for the provision of a range of accommodation services. Finally, at the municipal or local level of government there is a further suite of state assets that potentially can be leveraged for assisting SMME development linked to tourism through using public procurement levers. The wide range of these municipal assets can be appreciated by examining the unpublished data base on municipal tourism assets which has been prepared by South Africa's Department of Tourism. Although this data base is admittedly incomplete and

offers only partial coverage it does allow a glimpse and indication of the types of assets under municipal control. The broad range and character of municipal tourism assets that might be leveraged through public procurement for tourism SMME development can be gleaned from an analysis of municipal assets which are recorded for two provinces in this data set. The choice of Western Cape (Table 2) and Eastern Cape (Table 3) provinces is influenced simply by the quality of responses received from its various municipalities about the existence of their local assets.

Table 3. State Assets by Category: Eastern Cape
(Source: Unpublished Department of Tourism Database)

Type of Asset	Number
Nature reserve	35
Heritage site	16
Camping or Caravan Park	14
Conference facility	10
Dams	9
Beach	7
Museum	6
Visitor Centre	6
Arts Centre	6
River	6
Botanical Garden	4
Stadium	4
Holiday Resorts	3
Hiking trail	2
Water Falls	2
Cultural Village	1
Aquarium	1
Zoo	1
Harbour	1
Bowling	1

Notes; (1) Data base reflects reporting municipalities only, (2) Category of holiday resorts also includes several which offer camping and caravan sites. (3) Several nature reserves offer various forms of accommodation

Several points can be observed from an examination of Tables 2 and 3. The range of assets is broad as is indicated also from other provinces which list also a range of conference centres, dams, zoo, aquarium, sports stadia, picnic sites. Arguably, however, across the reporting provinces and on the basis of the existing limited data, the most common forms of municipal assets that might be leveraged for tourism relate to nature reserves, holiday resorts, camping and caravan parks, museums and heritage sites, botanical or nature gardens, harbours and beaches. Potentially there exist geographical variations in terms of inter-provincial differences in the kinds of state assets that might be leveraged. Of particular note in Eastern Cape is the significant number of conference centres that are listed; in Western Cape this category of assets was not mentioned at all.

In addition to these major state assets there are a large number of smaller municipal assets which include local nature reserves, accommodation complexes, camp sites, heritage sites, caravan parks and even a number of lighthouses that might be leveraged through public procurement for greater inclusive growth in South Africa. Arguably, potential opportunities exist through leveraging these and similar assets by using public procurement to support the goals of tourism development in South Africa. The implementation of public procurement can be utilized to expand initiatives for supporting black-owned SMMEs in tourism or incorporating black SMMEs as suppliers in tourism value chains associated with state assets.

This conclusion about extending the reach of targeted public procurement into the tourism sector of South Africa points to the critical importance of undertaking research to monitor the leveraging of state assets for supporting South Africa's nationally proclaimed objective of a more inclusive tourism economy.

Acknowledgement

Thanks are due to South Africa's Department of Tourism for financial support of the research reported in this paper as well as making available or access to certain unpublished documents and data to assist this research. Comments from reviewers also were most appreciated.

REFERENCES

- Akenroye, T.O., Oyegoke, A.S. & Eyo, A.B. (2013). Development of a Framework for the Implementation of Green Public Procurement in Nigeria. *International Journal of Procurement Management*, 6 (1).
- Ambaw, B.A. & Telgan, J. (2017). The Practice of Performance-based Contracting in Developing Countries' Public Procurement: The Case of Ethiopia. *Journal of Public Procurement*, 17 (3), 402-431.
- Amoah, C. & Shakantu, P.W. (2017). The Effectiveness of the Preference Policies in the Ghanaian Procurement Law in Promoting the Local Construction Industry. *Journal of Construction Project Management and Innovation*, 7 (1), 1859-1876.
- Bakker, M. & Messerli, H. (2017). Inclusive Growth versus Pro-Poor Growth: Implications for Tourism Development. *Tourism and Hospitality Research*, 17 (4), 384-391.
- Basheka, B.C. (2018). Inclusive Public Procurement: Opportunities, Barriers and Strategies (OBS) to Women Entrepreneurs Participation in Public Procurement in Uganda. *Administratio Publica*, 26 (1), 86-106.
- Biddulph, R. (2018). Social Enterprise and Inclusive Tourism: Five Cases in Siem Reap, Cambodia. *Tourism Geographies*, 20 (4), 610-629.
- Bolton, P. (2006). Government Procurement as a Policy Tool in South Africa. *Journal of Public Procurement*, 6(3), 193-217.
- Bolton, P. (2008a). Protecting the Environment through Public Procurement: The Case of South Africa. *Natural Resources Forum*, 32(1), 1-8.
- Bolton, P. (2008b). The Public Procurement System in South Africa: Main Characteristics. *Public Contract Law Journal*, 37 (4), 781-802.
- Bolton, P. (2016). Public Procurement as a Tool to Drive Innovation in South Africa. *Potchefstroom Electronic Law Journal* 2016 (19).
- Breytenbach, T. (2011). *Integrated Small Enterprises Supplier Development Programme*. Pretoria: Small Enterprise Development Agency.
- Bukula, S. M. (2018). What SMEs Can Do To Increase Their Inclusion in the Tourism Value Chain. In Sustainable Tourism Partnership (comp.), *The Responsible and Sustainable Tourism Handbook: South Africa Volume 6*, Cape Town: Alive2green, 88-91.
- Butler, G. & Rogerson, C.M. (2016). Inclusive Local Tourism Development in South Africa: Evidence from Dullstroom. *Local Economy*, 31 (1-2), 264-281.
- Campos, M.J.Z., Hall, C.M. & Backlund, S. (2018). Can MNCs Promote More Inclusive Tourism?: Apollo Tour Operator's Sustainability Work. *Tourism Geographies*, 20 (4), 630-652.
- Correia, F., Howard, M., Hawkins, B., Pye, A. & Lamming, R. (2013). Low Carbon Procurement: An Emerging Agenda. *Journal of Purchasing and Supply Management*, 19 (1), 58-64.
- Delmonico, D., Jabbour, C.J.C., Pereira, S.C.F., de Sousa Jabbour, A.B.L., Renwick, D.W.S. & Thome, A.M.T. (2018). Unveiling Barriers to Sustainable Public Procurement in Emerging Economies: Evidence From a Leading Sustainable Supply Chain Initiative in Latin America. *Resources, Conservation and Recycling*, 134, 70-79.
- Dilger, R.J. (2010) *Small Business Administration HUBZone Program*. Washington DC: Congressional Research Service Report.
- Engelbert, A. (2017). *Public Procurement Law in Sub-Saharan Africa: A Means to Curb Corruption?*. Baden-Baden: Nomos.
- Engelbert, A., Kaltenborn, M. & Reit-Born, N. (2016). *Effective Corruption Control – Supplier Remedies in Public Procurement in Kenya, Uganda and Tanzania – A Comparative Analysis of Mechanisms and Their Implementation*. Berlin: Logos Verlag.

- Ensor, L. (2017). New Fund Will Encourage Inclusive Growth in Tourism Sector, Tokozile Xasa Says. Available at <https://www.businesslive.co.za/bd/economy/2017-05-08> [Accessed 2 May 2018].
- Ensor, L. (2018). Transformation Framework: Treasury Plans to Redo Procurement Laws. Available at <https://www.businesslive.co.za/bd/national/2018-04-24> [Accessed 25 June, 2018].
- Flynn, A. & Davis, P. (2015). The Rhetoric and Reality of SME-friendly Procurement. *Public Money and Management*, 35 (2), 111-118.
- Hanekom, D. (2015). Keynote Address Delivered by Minister of Tourism, Derek Hanekom, at the SATSA Conference at Fancourt, George 14 August. Available at www.tourism.gov.za/AboutNDT/Ministry/News/Pages/Hanekom_SATSA-Conference [Accessed 8 September 2015].
- Herrington, M.D. & Overmeyer, T. (2006). Study on the Procurement Relationship between Large Corporations and Mainly Black Owned or Empowered SMEs. Report prepared for ECI Africa, Johannesburg.
- Hjalager, A.M. (2002). Repairing Innovation Deficiencies in Tourism. *Tourism Management*, 23 (5), 465-474.
- Hoekman, B. & Sanfilippo, M. (2018). *Firm Performance and Participation in Public Procurement: Evidence from Sub-Saharan Africa*. Florence: European University Institute, Working Papers RSCAS 2018/16.
- House-Soremekun, B. (2007). The Impact of Minority Set-aside Programs on Black Business Success in Cleveland, Ohio: Implications for Public Policy. *Western New England Law Review* 30(19), 19-37.
- Indriani, Y., Dasuki, R.E. & Wipartini, Y. (2017). Inclusive Economic Development Model as The Alternative of Sustainable Social-economy Engineering: A Case of Tourism-based Social Economy Development in Wakatobi Regency. *European Journal of Economics and Business Studies*, 3 (2), 124-130.
- Israel, B. & Kazungu, I. (2019). The Role of Public Procurement in Enhancing Growth of Small and Medium Sized-Enterprises: Experience from Mbeya, Tanzania. *Journal of Business Management and Economic Research*, 3 (1), 17-27.
- Leon de Mariz, C., Menard, C. & Abeille, B. (2014). *Public Procurement Reforms in Africa: Challenges in Institutions and Governance*. Oxford: Oxford University Press
- Loader, K. (2018). Small-and Medium-sized Enterprises and Public Procurement: A Review of the UK Coalition Government's Policies and Their Impact. *Environment and Planning C: Politics and Space*, 36 (1), 47-66.
- Mahmood, S. A. I. (2010). Public Procurement and Corruption in Bangladesh: Confronting the Challenges and Opportunities. *Journal of Public Administration and Policy Research*, 2(6), 103-111.
- McCrudden, C. (2004). Using Public Procurement to Achieve Social Outcomes. *Natural Resources Forum*, 28, 257-267.
- Mesatywa, N. (2011). *Levering public procurement*. Paper Presented at the Annual Small Business Summit, 12 October, Bloemfontein, South Africa.
- Mphela, T. & Shunda, J.P. W. (2018). Can Small, Medium and Micro Enterprises Survive in Public Procurement? Lessons from Botswana. *Journal of Public Procurement*, 18 (2), 90-110.
- Nijaki, L.K. & Worrel, G. (2012). Procurement for Sustainable Local Economic Development. *International Journal of Public Sector Procurement*, 25 (2), 133-153.
- Ntingi, A. (2016). Tender Set-asides Part of New BEE narrative. Available at <https://www.fin24.com/Finweek/Opinion/tender-set-asides-part-of-new-bee-narrative> [Accessed 17 May 2018].
- Ntsika (1997). *Markets in the State Sector: Procurement Guidelines for Small, Medium and Micro Enterprises (SMMEs) and Service Providers*. Pretoria: Ntsika and DTL.
- Orser, B. (2009). *Procurement Strategies to Support Women-owned Enterprises*. Ottawa: Canada Works Limited.
- Osiba Research (2011). *Rethinking Small Business Support in South Africa*. Pretoria: Department of Trade and Industry, Pretoria.
- Preuss, L. (2011). On the Contribution of Public Procurement to Entrepreneurship and Small Business Policy. *Entrepreneurship and Regional Development*, 23 (9-10), 787-814.
- Quinot, G. & Arrowsmith, A. eds. (2013). *Public Procurement Regulation in Africa*. Cambridge: Cambridge University Press.
- Ram, M. & Smallbone, D. (2003). Policies to Support Ethnic Minority Enterprise: The English Experience. *Entrepreneurship and Regional Development*, 15(2), 151-166.
- Rogerson, C.M. (2004). Pro-poor Local Economic Development in South Africa: The Application of Public Procurement. *Urban Forum*, 15, 180-210.
- Rogerson, C.M. (2005). Unpacking Tourism SMMEs in South Africa: Structure, Support Needs and Policy Response. *Development Southern Africa*, 22 (5), 623-642.
- Rogerson, C.M. (2014). Reframing Place-based Economic Development in South Africa: The Example of Local Economic Development. *Bulletin of Geography: Socio-Economic Series*, 24, 203-218
- Rogerson, C.M. & Rogerson, J.M. (2019). Tourism, Local Economic Development and Inclusion: Evidence from Overstrand Local Municipality, South Africa. *GeoJournal of Tourism and Geosites*, 25 (2), 293-308.
- Scheyvens, R. & Biddulph, R. (2018). Inclusive Tourism Development. *Tourism Geographies*, 20 (4), 589-609.
- Sonfield, M. (2010). Ethnic Minority Businesses and Targeted Assistance Programs in the U.S. and the UK: A Comparison and Implications. *Small Business Institute National Proceedings*, 34 (Winter), 11-17.

- Thai, K.V. (2001). Public Procurement Re-examined. *Journal of Public Procurement*, 1(1), 9–50.
- Timm, S. (2011). *How South Africa Can Boost Support to Small Businesses: Lessons from Brazil and India*. Pretoria: Trade and Industrial Policy Secretariat.
- Timm, S. (2015). 30% Set-aside For Small Biz. Available at <http://www.smallbusinessconnect.co.za/news/30-set-aside-for-small-biz.html> [Accessed 17 May 2018].
- Uromi, S.M. (2014). Challenges Facing Public Procurement Information in some African Countries Namely South Africa, Uganda, Zimbabwe and Tanzania. *International Journal for Innovation Education and Research*, 2 (7), 54–60.
- Van der Merwe, C. (2019). The Geography of Heritage in South Africa. In: J. Knight & C.M. Rogerson (eds.), *The Geography of South Africa: Contemporary Changes and New Directions*, Cham: Springer International, 133–141.
- Williams-Elegbe, S. (2013). The World Bank Influence on Procurement Reform in Africa. *African Journal of International and Comparative Law*, 21 (1), 95–119.
- Williams-Elegbe, S. (2015). A Comparative Analysis of the Nigerian Public Procurement Act Against International Best Practice. *Journal of African Law*, 59 (1), 85–98.
- Wittig, W.A. (1999). Building Value Through Public Procurement: A Focus on Africa. Paper Presented at the 9th International Anti-Corruption Conference, 10–15 October, Durban.
- *** African Procurement Law Unit (2018). *Public Procurement Regulation in Africa: Bibliography 2018*. Stellenbosch: University of Stellenbosch African Procurement Law Unit.
- *** Centre for Research in Ethnic Minority Entrepreneurship (2007). *Supplier Diversity: A Guide for Purchasing Organisations*. Leicester: De Montfort University.
- *** Department of Public Works (2005). *Government-Wide Immovable Asset Management Policy*. Pretoria: Department of Public Works.
- *** Department of Public Works (2008). *Immovable Asset Management in National and Provincial Government: Guideline for Custodians*. Pretoria: Department of Public Works.
- *** Department of Small Business Development (2018). *Functions Aligned to the Mandate of DSBD*. Pretoria: DBSD.
- *** Department of Tourism (2018). *National Tourism Sector Strategy 2016–2026*. Pretoria: Department of Tourism.
- *** Department of Trade and Industry (2006). *Integrated Small-Enterprise Development Strategy: Unlocking the Potential of South African Entrepreneurs*. Pretoria: Department of Trade and Industry.
- *** Department of Trade and Industry (no date) [2009?]. Targeted Procurement for Small Enterprises. Unpublished Brief prepared for NEDLAC, Johannesburg.
- *** Kaiser Associates (2010). *Public Sector Procurement from Small, Medium and Micro Enterprises (SMMES)*. Cape Town: Kaiser Associates.
- *** National Treasury (2017). *Media Statement: Revised Preferential Procurement Regulations, 2017*. Pretoria: National Treasury.
- *** National Treasury (2018). *Media Statement: Alleged Abuse of the 30% Subcontracting Requirements Provided for in the Preferential Procurement Regulations, 2017*. Pretoria: National Treasury.
- *** Republic of South Africa (2018). *Presidential Jobs Summit Framework Agreement*. 4 October.
- *** The Presidency (2011). *National Development Plan: Vision for 2030*. Pretoria: National Planning Commission.
- *** The Reference Group on Small Business Development and the World Bank (1994). Public and Private Sector Procurement Programmes and Their Contribution to Emerging Enterprises in South Africa. Paper presented at the Workshop on Small, Medium and Micro Enterprise Development and Financing, Pretoria, 3 November.
- *** UNEP (United Nations Environment Programme) (2017). *Global Review of Sustainable Public Procurement*. Nairobi: UNEP.
- *** World Bank (2018). *An Incomplete Transition: Overcoming the Legacy of Exclusion in South Africa*. Washington DC: The World Bank Report No. 125838-ZA.

Submitted:
24.03.2019

Revised:
15.07.2019

Accepted and published online
01.08.2019

THE ROLE OF DALIHAN NA TOLU IN ENHANCING THE TOURISM APPEAL OF PARBABA WHITE SAND BEACH IN SAMOSIR REGENCY AS INDONESIA'S NATIONAL GEOPARK

Rosnidar SEMBIRING*

University Sumatera Utara, Faculty of Law, Department of Civil Law, University Street No.4,
Padang Bulan, Medan Baru, Medan, Sumatera Utara 20155, e-mail: rosnidar@usu.ac.id

Erna HERLINDA

University Sumatera Utara, Faculty of Law, Department of Civil Law, University Street No.4,
Padang Bulan, Medan Baru, Medan City, Sumatera Utara 20155, e-mail: erna@usu.ac.id

Afrita AFRITA

University Sumatera Utara, Faculty of Law, Department of Civil Law, University Street No.4,
Padang Bulan, Medan Baru, Medan, Sumatera Utara 20155, e-mail: afita@usu.ac.id

Suria NINGSIH

University Sumatera Utara, Faculty of Law, Department of Civil Law, University Street No.4,
Padang Bulan, Medan Baru, Medan, Sumatera Utara 20155, e-mail: suria@usu.ac.id

Iskandar MUDA

University Sumatera Utara, Faculty Economic and Business, Department of Accounting, Street
Prof. TM Hanafiah 12, Padang Bulan, Medan, Indonesia, 20155, e-mail: iskandar1@usu.ac.id

Citation: Sembiring, R., Herlinda, E., Afrita, Ningsih, S., & Muda, I. (2019). THE ROLE OF DALIHAN NA TOLU IN ENHANCING THE TOURISM APPEAL OF PARBABA WHITE SAND BEACH IN SAMOSIR REGENCY AS INDONESIA'S NATIONAL GEOPARK. *GeoJournal of Tourism and Geosites*, 26(3), 701–713. <https://doi.org/10.30892/gtg.26302-390>

Abstract: The purpose of this study is to analyze some factors that influence the inhibition of local communities in the development of tourism in the White Sand of Parbaba, Indonesia. The type of research is an empirical juridical method. It was conducted in Huta Bolon Village, Pangururan Subdistrict, Samosir Regency, North Sumatera Province, Indonesia. The research sample was collected using the technique of Stratified Random Sampling. The findings of this research, it can be concluded that the community of Huta Bolon Village, Pangururan Subdistrict, Samosir Regency still lack tourism awareness. This is evidenced by the findings in which garbage scatters along the beach, and poultry and cattle roam around the beach.

Key words: *Dalihan Natolu*, tourism, local communities, Parbaba white sand beach, Indonesian National Geopark

* * * * *

* Corresponding author

INTRODUCTION

In Indonesia, tourism is one of the sectors that play an important role in the sustainability of Indonesian economy. If managed well and properly, tourism development as one of the industries will create prosperity through advances in transportation, accommodation, and communications that create relatively large employment opportunities. Based on the Regulation of North Sumatera Governor No. 34 of 2015 concerning the Agency for Management of the Geopark of Toba Caldera of North Sumatera Province (Republic of Indonesia, 2016), The Samosir Regency is designated as Indonesia's National Geopark. This is consistent with the Research Master Plan of the University of North Sumatera (RIP) Years 2016 to 2020 in the legal, social, and cultural sectors, namely development of research into the potential of the community's culture and community participation to support the harmony of the environment. This is further described in the strategic program on social life of the community, namely social life, politics, economy, culture, and religion of the community, views, and cultural exploration, preservation, utilization, prospect, and development. Pursuant to the Regulation of North Sumatera Governor No. 34 of 2015 concerning the Agency for Management of the Geopark of Toba Caldera of North Sumatera Province (Republic of Indonesia, 2016), The Samosir Regency has been designated as Indonesia's National Geopark. Furthermore, it is stipulated in the strategic program on social life of the community, namely social life, politics, economy, culture, and religion of the community, views, and cultural exploration, preservation, utilization, prospect, and development. Samosir is an area with promising potential for tourism, such as nature attractions (Lake Aek Natonang and Lake Sidihoni), hot springs, Lake Toba, waterfalls, and historic attractions associated with the Batak peoples such as *Sopo Tatea Bulan*, *Aek Sipitu Dai* (water with seven flavours), Marhosa Stone, Hobon Stone, and Guru Stone. Dilemmas arise when the philosophy of the Batak peoples, namely *Dalihan NaTolu* (*hula-hula*, *dongan tubu*, and *anak boru*) is applied to tourists. Tourists are considered new comers and serve as *boru* who have provide services, while the Batak peoples (locals are called *hula-hula*) should be treated like a king. However, in the concept of tourism, the opposite applies where it is tourists (both local and foreign one) who are to be served.

Geopark is an area that has geological elements in which local communities are invited to play a role in protecting and improving the function of natural heritage (Mossa et al., 2018), including the archeological, ecological and cultural values contained within it. In 2000, European Union (EU) countries began implementing the Manifesto on Earth Heritage and Geodiversity (Ruban, and Yashalova, 2018). They placed geomorphology as the main component of the landscape. Du and Girault (2018) state this effort is supported by many international organizations such as the European Geopark Network, the International Association of Geomorphology (IAG), the International Union of Geological Sciences (IUGS), and the International Geographical Union (IGU). In the Asia-Pacific region, a similar Geopark network was formed, which remains affiliated with UNESCO (Mossa et al., 2018). The establishment of the Asia-Pacific Geopark Network was initiated by countries that already have Global Geopark namely China, Japan, Malaysia and Australia. The main purpose of Geopark is to protect the geological heritage that is in European countries by a non-governmental organization called EGN (Europe Geopark Network) in 2001 (Nikolova & Sinnyovsky, 2019). The existence of Geopark by the World Agency (United Nations Educational, Scientific and Cultural Organization/UNESCO) was developed and facilitated by forming the GGN (Global Geopark Network) organization in 2004 to be able to accommodate more members from countries in the world. In addition, the purpose of Geopark is further developed, not just protecting geological heritage.

According to the UNESCO GGN (2004), the purpose of Geopark is to take advantage, explore, appreciate and develop the geological heritage. Samosir is an area with promising potential for tourism, such as nature attractions (Lake Aek Natonang and Lake Sidihoni), hot springs, Lake Toba, waterfalls, and historic attractions associated with the Batak peoples such as *Sopo Tatea Bulan*, *Aek Sipitu Dai* (water with seven flavours), Marhosa Stone, Hobon Stone, and Guru Stone. Any tourist attractions which are created by God and constitute ancestral heritage are extremely priceless treasures because they will continuously generate income for the region if managed well. Directly, it can be seen that the community of Samosir still lack the awareness of the existence of extremely valuable treasures around them. Among the evidence suggesting such a condition is that despite the plan to make Lake Toba as the World's geopark and tourism in Samosir as the Monaco of Asia, garbage still scatters around the road to the tourist attraction and quality of the services provided to tourists remains poor. Considering the facts, based on the research into the community of Samosir, it is necessary to improve their human resources in order to improve service quality and quality of tourism in Samosir Regency (Pardede and Purnama, 2016). The tourist destination of the lake *Parbaba White Sand Beach* is located in Huta Bolon Village, Pangururan Subdistrict, Samosir Regency. The geographical location is in Figure 1 below. Based on the Figure 1 shows that the location of Parbaba White Sand Beach from the capital of the Province of North Sumatra plated 5 hours 55 minutes.

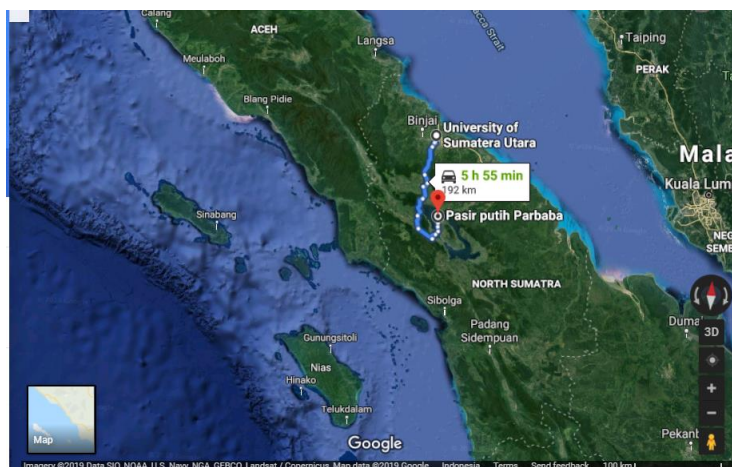


Figure 1. The geographical location of *Parbaba White Sand Beach* (Source: Google Maps 2018)

While the geographical location in Google Maps images is as follows in Figure 2. It was the Government of Samosir Regency that suggested designating white sand beach areas as a tourist attraction in 2006 due to their natural potential to serve as a tourism area. The uniqueness of this tourist attraction lies in its white sand. The Batak Toba peoples which are the native inhabitants of Huta Bolon Village, Pangururan Subdistrict, Samosir Regency have a philosophy, which serves both as a principle as well as a structure and a system in its society, known as *Dalihan Na Tolu*. *Dalihan Na Tolu*, i.e. a philosophy or a socio-cultural insight relating to the Batak peoples and their culture. *Dalihan Na Tolu* serves as a framework which includes relations by blood and by marriage which connect one group. *Dalihan Na Tolu* as the kinship system of the Batak peoples has an equally important value with the system which is very popular nowadays, namely democracy. *Dalihan Na Tolu* symbolizes the way of life of the Batak peoples amid

the community. The kinship system of the Batak peoples puts one in 3 (there) exact positions since birth to death known as *Dalihan Na Tolu*. *Dalihan Na Tolu* is a cultural system of the Batak Toba peoples. The value it contains is adopted as the way of life and serves as a source of motivation which guides their behaviour (Nainggolan, 2010).

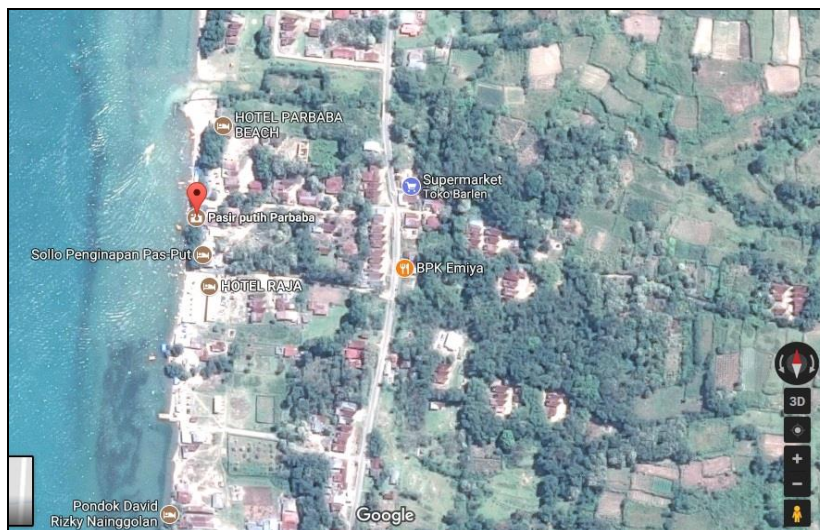


Figure 2. The geographical location of Parbaba White Sand Beach with google maps
(Source: Google Maps 2018)

Once one becomes the Batak Toba peoples, she/he must be ready to have dual social status, as a “king”, a “fellow”, and a “servant”. In the customary law terms, these are referred to as “*hula-hula*” (king), “*dongan tubu*” (fellow), and “*boru*” (servant). These three terms are known as the *Dalihan Na Tolu* triangle. If implemented amid the community of a “*huta*” (village), then the “*marga* (name of the clan) of the king” who opens, controls, and governs the “*huta*” will automatically become „the King of the *Huta*” and “*hula-hula*” and at the same time will have the status as “*suhut ni huta*” (the Host). Then, the other *margas* whose wife has the same *marga* as „the king’s *marga* „will automatically become “*boru*” (guest clan). “*Dongan tubu*” is a relative of the same *marga* in and outside the village. The triangular relationship between “*hula-hula*”, “*dongan tubu*”, and “*boru*” is guided by the following norms: “*Somba marhula-hula; manat mardongan-tubu; elek marboru.*” which can be interpreted as “respect for “*hula-hula*”; solidarity for „*dongan tubu*”, love for “*boru*”. Of the three statuses, the status of “*hula-hula*” and “*boru*” is the most prominent one for the Batak peoples. “*Hula-hula*” is the “king”, while “*boru*” is a „servant”. “*Somba*” (worship, respect) to “*hula-hula*” is the task of “*boru*”, and “*elek*” (persuasion, love) to “*boru*” is “*hula-hula*”. Dilemmas arise when these are applied to tourists. In the context of the social structure of “*huta*”, tourists are outsiders and thus they fall into the category of “guest *marga*” or “*boru*”, while the Batak peoples are “the King of *Huta*”, “the king’s *marga*” aka “*suhut*” or the host. The problem is that in the theory and practice of tourism, tourists are “the king who has to be served”. In this matter, the Batak peoples who claim to be “the king of *huta*” (“*hula-hula*”) in fact should serve tourists who are perceived as “guest *marga*” (“*boru*”). In addition, the habit of the Batak peoples who always litter, allow livestock to roam everywhere, and refuse transfer of land rights due to the belief that land belongs to the public, which is *magisch*

komunalistik in nature (known as communal rights) serve as the factors inhibiting the advancement of tourism of Parbaba White Sand Beach in Huta Bolon Village, Pangururan Subdistrict, Samosir Regency which is included in the Indonesian National Geopark.

In essence, the participation of the community by showing their friendly attitude is expected to be the basis of the creation of global tourism in the international arena (Fandeli, 2010). Actually in their everyday life, the Batak peoples have already known the so-called *Poda Na Lima* which serves as a principle of morality taught for generations and taught since they are in elementary school in the Land of Batak. The role of *Dalihan Na Tolu* in reviving *Poda Na Lima* is a necessity for tourism development at Parbaba White Sand Beach located in Huta Bolon Village, Pangururan Subdistrict, Samosir Regency. Based on the foregoing, the following problems can be formulated (1) What factors from the local community inhibit development of Parbaba White Sand tourism? (2) What is the role of *Dalihan Na Tolu* in enhancing the appeal of Parbaba White Sand tourism in Samosir Regency as Indonesia's National Geopark? And (3) What solutions are offered to the factors that inhibit development of Parbaba White Sand tourism?

LITERATURE REVIEW

Geopark

Geopark is a component related to nature and life on earth. The Geopark concept has three basic meanings (Nikolova & Sinnyovsky, 2019), namely:

1. It is an area that has a meaning as a geological heritage so it needs to be preserved, as well as a place to apply a sustainable economic development strategy carried out through a good and realistic management structure. Geopark is an area that contains various types of geological elements that have meaning and function as natural heritage (Nikolova & Sinnyovsky, 2019). In this area various strategies for sustainable regional development can be implemented, whose promotion must be supported by government programs. As a region, the Geopark must have clear and clear boundaries. The Geopark surface area must also be sufficient, meaning that it can support the implementation of its development action plan activities (Ruban & Yashalova, 2018).

2. Implementing geopark provides an opportunity for job creation for local communities in terms of gaining real economic benefits through sustainable tourism activities. Geopark contains a number of geological sites (geosite) that have meaning from the side of science, scarcity, beauty (aesthetics), and education. Activities in Geopark are not limited to geological aspects, but also other aspects such as archeology, ecology, history and culture.

3. Geological heritage objects and geological knowledge shared with the general public. The existing geological and landscape elements are related to aspects of the natural and cultural environment. Park. The geological site of the Geopark is part of the earth's heritage. Based on the meaning, function and opportunity of its use, the existence and preservation of these sites need to be protected and protected.

Indonesia's National Geopark

Geopark is a management concept of sustainable tourism development that combines three natural varieties, namely geology and geomorphology (Geodiversity), Geoheritage geodiversity, and Geodiversity conservation (Geoconservation). Indonesia currently has five areas that have been declared a national park by the Geological Agency of the Ministry of Energy and Mineral Resources Ministry of the Creative Economy. The five areas are Mount Sewu (covering three provinces, Central Java, Yogyakarta, and East Java); Merangin (Jambi); Mount Rinjani (West Nusa Tenggara); Lake Toba (North Sumatra); and Mount Batur (Bali). Especially for Mount Batur has been declared by the

United Nations Educational, Scientific and Cultural Organization (UNESCO) in 2012 as one of the world's international Geopark (Perdana, 2013).

Sustainable Tourism

Building sustainable tourism is not just about controlling and managing the negative impacts of the industry. But it puts the sector in a privileged position to provide economic and social benefits to local communities, and to raise awareness and support for environmental conservation. In the tourism sector, economic development and environmental protection should not be seen as opposing forces, but must be interconnected with each other as aspirations that can and should be mutually reinforcing (UNEP-UNWTO 2005). For that purpose UNWTO (2004) states that sustainable tourism should: 1) optimally utilize environmental resources that are a key element in tourism development; 2) respecting the socio-cultural authenticity of local communities; and 3) ensuring a viable long-term economic impact, by providing socio-economic benefits to all stakeholders, including stable employment and social services for local communities, and contributing to poverty alleviation.

A key challenge in sustainable tourism is developing economically viable enterprises that provide livelihood benefits to local communities while protecting indigenous cultures and environments (Simpson, 2007 and Tomori, 2010). Sustainable tourism development requires the participation of information from all stakeholders, as well as strong political leadership to ensure broad participation and build consensus (Strba, 2015). Achieving sustainable tourism is an ongoing process and requires constant monitoring of impacts, introducing necessary preventive and/or remedial measures when needed. Sustainable tourism should also maintain the level of tourism satisfaction and ensure a meaningful experience for tourists, raise their awareness on sustainability issues and promote environmentally friendly tourism practices among them (Egresi & Polat, 2016 and Carvache et al., 2018). UNEP-UNWTO (2005) states that sustainability is the responsibility of all parties involved in tourism. However, there is a clear need for governments to take a leading role. This is due to: 1) The tourism industry is highly fragmented; 2) Sustainability relates to areas of public concern; and 3) Governments have many tools that can be used to make a difference-such as the power to legislate and offer economic incentives, and resources and institutions to promote and disseminate good practice. To that end, the Government should provide space and encourage the private sector, tourists and other stakeholders to respond to sustainability issues (Chakrabarty & Mandal, 2018). This can be achieved by establishing and implementing a series of policies for the development and management of sustainable tourism. To ensure the long-term sustainability of the tourism sector, there is a need for effective policies and plans at all levels, especially at the local level, where tourism activities take place. Where travellers interact with service providers and communities, and where the most positive and negative tourism impacts (UNWTO & MMTE 2007).

Sustainable Tourism Development Policy

Allan et al. (2015) state that the development of tourism products and tourism activities in an area can be detailed consisting of (1) selected attractions developed that have high selling value of natural attractions, heritage, culture and artificial objects, (2) infrastructure (facilities, utilities) constructed according to local culture and traditions and integrated with their environment, (3) local institutions are strengthened and given greater role, (4) human resources is the determinant of tourism success in accordance with its target, (5) economic aspect developed is populist economy. Earnings of the area intended to be able to maintain or conserve the area and improve the welfare of local communities, (6) the environment of tourism areas should be assessed feasibility, especially positive impacts and negative impacts that will arise. Environmental Impact

Analysis is an instrument for assessing environmental impacts and how to deal with them (Fandeli & Nurdin, 2005; Coratza et al., 2015).

In the development of sustainable tourism development policy, many methods have been used. Lu & Nepal (2009) in his paper entitled Sustainable tourism research, has analyzed and identified research papers published in the Journal of Sustainable Tourism, which is the only international journal which exclusively presents research on sustainable tourism. In this paper it is stated that most papers (139 or 41%) have applied qualitative methods, followed by quantitative methods (125 or 37%) and mixes (21 or 6%), while 16% are theoretical papers. The data collection methods used in the analysis of sustainable destinations remains unchanged, with social survey methods and case studies as the two most commonly applied methods. In this article it is also emphasized that the concept of sustainable tourism can only be carried out efficiently if there are sustainability indicators that are useful, reliable and understandable. In line with the results of the study (Lu & Nepal 2009), UNEP-UNWTO (2005) states that defining and using sustainability indicators is a key component in the process of planning and managing sustainable tourism. Given these indicators, it is possible to monitor changes over time in a constant and consistent manner. Indicators can be used to indicate: 1) current state of the industry; 2) pressure on the system; 3) the impact of tourism; 4) management efforts; and 5) the impact of management actions. Indicators provide early warning of when a new policy or action change may be needed, and also provides the basis for long-term planning and review of tourism. It is further explained that an indicator can be measured by complementary alternatives and methods (the use of different instruments) and can be described in different forms, both quantitative and qualitative (UNWTO 2004).

RESEARCH METHODS

This is empirical juridical research. Juridical research is a descriptive research, a research model that seeks to create a picture/exposure and dig carefully and deeply about certain social phenomena without intervening and hypothesis. The purpose of descriptive research is to clarify the picture systematically, accurately about the facts under investigation. Based on this, the techniques of data collection used include direct observation, through the interview, as well as in-depth interviews, Focus Group Discussion (FGD) and their study data documentation in the form of government policies relating to tourism. The main research approach used is qualitative approach, so the main data is qualitative. However, to complete the analysis of qualitative data, it will be displayed and reinforced also with data that is quantitative, with the understanding that this study using qualitative paradigms equipped and reinforced with quantitative data. Qualitative analysis used is descriptive inductive, while quantitative data used is percentage in tabulation form. So in accordance with the purpose of research, then for qualitative data presented in the form of inductive description. The research was undertaken in Huta Bolon Village, Pangururan Subdistrict, Samosir Regency, North Sumatra Province. Among the tourist destinations in the area of Lake Toba is Parbaba White Sand Beach is located in Huta Bolon Village.

The research population consisted of the community of Huta Bolon Village residing in the research site. The number of respondents coming from the community was determined using the technique of stratified random sampling based on their livelihood and age. The data from the selected community were obtained using questionnaires and afterwards, in-depth interviews with several informants such as Head of Huta Bolon Village, Subdistrict Head, Customary Leaders (FKTM), Tourism Office of Samosir Regency, and Office of Culture, Youth, and Sport of Samosir Regency.

RESULT AND DISCUSSION

Result

General Description of the Research Site

Samosir Regency is regency which formerly was part of Toba Samosir Regency in accordance with the Law No. 36 of 2003 dated 18 December 2003 concerning Establishment of Samosir and Serdang Bedagai Regencies. The establishment of Samosir as a new regency is the first step to start accelerated development towards a more prosperous society. Pangururan is one of the subdistricts in Samosir Regency and is the capital of Samosir Regency, North Sumatera. Pangururan consists of several villages such as Huta Bolon, Parbaba, Sialanguan, Sinabulan, Lumbansuhi, and so on. As the capital of the Regency, Pangururan has several tourist attractions that are visited by many tourists, including Parbaba White Sand Beach, Hot Spring, Museum of the Inculturated Catholic Church, Boru Naibaho Tree Area, Huta Bolon Volly Beach, Tano Ponggo Bridge, and Indah Situngkir Beach. Huta Bolon Village is one of the villages in Pangururan Subdistrict, Samosir Regency. This village was selected as the research site after Lake Toba has been designated as Toba Caldera Geopark based on Regulation of North Sumatera Governor No. 34 of 2015. One of the tourist destinations in Lake Toba is Parbaba White Sand Beach located in Huta Bolon Village. Almost all of the residents inhabiting this village come from the same clan, namely Batak Toba, and are either Protestants or Catholics and uphold the philosophy of "*Dalihan Natolu*" where customs are maintained and preserved in various aspects of life. Thus, any major conflicts among society almost never occur, except for minor conflicts among individuals. The inhabitants of Huta Bolon Village also have long adopted the system of *gotong royong* (mutual assistance) which has been handed down from generation to generation in their everyday life such as in wedding ceremony, death ceremony, ceremony to celebrate a new house, and so on. The community of Huta Bolon Village always participate in the implementation of such events either in terms of money and other tangible objects or energy.

Factors from the Local Community that Inhibit Development of Parbaba White Sand Tourism.

In this research, the team of researchers conducted observation to the research site and interviewed the community relating to the topic of the research. Based on the interviews, it was revealed that among the factors from the local community that inhibit development of Parbaba White Sand Tourism is that the community remain lacking tourism awareness as shown by garbage which still scattered everywhere. The Chief of Huta Bolon Village, Belly Boiking Sihalohe adds that even though garbage collectors and garbage containers have been hired, they often work to collect the garbage the next day after they receive a call (the schedule to collect garbage is every two weeks). As for the issue of livestock, which still wandered everywhere, in fact a regional regulation stipulating the obligation to put livestock in a cage and/or watch them, namely the Regional Regulation No. 26 of 2006 (Republic of Indonesia, 2006), but the community do not comply with it saying that the Civil Service Police Unit (*Satpol PP*) almost never carried out their task inspecting the area, there is no village regulation stipulating livestock, and there are no firm sanctions against such violation. Based on interviews with the community of Huta Bolon Village, it is revealed that the presence of tourists in Parbaba White Sand Beach causes them a number of troubles, especially teenage tourists as their behaviour can be detrimental to morals of the village residents such as: displaying affection in front of the public or wearing clothes considered less polite to wear, which the village residents believe that such things will damage their cultural order. Moreover, the guests who visited that place often threw shards of glass into the lake.

The Role of *Dalihan Na Tolu* in Enhancing the Appeal of Parbaba White Sand Tourism

Dalihan Na Tolu which is often called "*Tungku Nan Tiga*" is an expression which expresses kinship in the clan Batak. Meanwhile, according to the Dictionary of Batak Toba Culture, *Dalihan Na Tolu* is defined as the basis of community life for all Batak peoples, which consists of three elements or frameworks, each constitutes an integral part (Marbun & Hutapea, 1987). *Dalihan Na Tolu* is the basic cultural concept of the Batak peoples that is very unique. Literally, *Dalihan Na Tolu* means *kaki tongue Nan tiga* and is a symbol for the social system of the Batak peoples consisting of three pillars, namely *dongan sabutuha*, *boru*, and *hula-hula*. This is consistent with a motto of the Batak peoples, namely *manat mardongan tubu, elek marboru, somba marhula-hula*, which means: "You should be careful with the friends of the same marga, serve *boru*, and show the attitude of worshipping towards *hula-hula*" (Siahaan, 1982). The customary group *Dalihan Na Tolu* is found in all the Batak peoples, although they may use different terms, but the meaning is the same. In the Batak Toba peoples, it is called *Dalihan Na Tolu*, which consists of the following elements: *Dongan Sabutuha*, *Hula-Hula*, and *Boru*. In the Mandailing community, this is also called *Dalihan Na Tolu*, which consists of the following elements: *Kahanggi*, i.e. family of the same marga or family by blood; *Mora*, i.e. family of the wife (who give the wife); and *Boru*, i.e. family that take the wife or the family of the son-in-law. In the Batak Karo community, it is called *Sangkep Si Telu*, which consists of *Kalimbubu*, *Senina*, and *Anak Beru*. Then, in the Batak Simalungun community, this is called *Tolu Sahundulan*, which consists of *Tondong*, *Senina*, and *Boru* (Sihombing, 1986).

The term *Dalihan Na Tolu* comes from the words *Dalihan* which means *Tungku* and *Na Tolu* which means *Nan Tiga*. The elements of *Dalihan Na Tolu*, namely *dongan sabutuha*, *hula-hula*, and *boru* should be in agreement and incorporated in every activity held either to celebrate happiness such as marriage and in the face of distress or misfortune. The Batak peoples believe that prosperity and happiness will be realized if the three functional elements of *Dalihan Na Tolu* unite as in the human existence, which consists of three elements, namely *hosa* (breath), *mudar* (blood), and *sibuk* (the flesh) (Sinaga, 2000). *Dongan Sabutuha*, *hula-hula*, and *boru*, which constitute the elements of *Dalihan Na Tolu*, is an adapt institution or a consultative council that will determine everything relating to the group. *Dalihan Na Tolu* has mechanisms to resolve all conflicts that occur in the group by holding close-family meetings, adapt meetings, or community meetings. The elements of *Dalihan Na Tolucan* serve as mediators between the two conflicting parties, but if this mediation fails, then *hula-hula* may act as an arbitrator who resolves the conflict using his power by making a coercive decision (Sitanggang, 1986).

Dalihan Na Tolu is the main pillar that supports the life of the whole cultural order of the Batak peoples consisting of *hula-hula – dongan sabutuha – boru*. It is above the three furnace legs the whole socio-cultural order is based (Harahap, 1987). *Dalihan Na Tolu* constitutes a form of culture of the Batak peoples that stipulates kinship among individuals. *Dalihan Na Tolucan* is illustrated as a three-leg cooking furnace in the kitchen where pots are placed upon it consisting of the following elements: parties of the same marga, parties receiving a wife, and parties giving a wife. *Dalihan Na Tolu* is one of the main values of the core cultural values of the clan Batak (Daulay, 2006). Based on findings of field research according to the information from the informants, *Dalihan Na Tolu* will definitely play a role in enhancing the tourism appeal of Parbaba White Sand Beach, for example in terms of development of tourism infrastructure (Sinaga, 2017). *Dalihan Na Tolu* plays a positive role because in the development of this tourist attraction according to the customs and beliefs of the local community, only the marga that establishes the village (i.e. *hula-hula*) is entitled to

undertake any construction-related activities in that area. However, as *Dalihan Na Tolu* adopts the principle of equality in term of positions (3 furnaces) in the genealogy of the family, the guest marga (*anak boru*) can also provide assistance in the development of the area. This is consistent with Naibaho (2017) stating that *Dalihan Na Tolu* is instrumental not only in the development of tourism but also in the issues of security among individuals. If one of the elements of *Dalihan Na Tolu* disappears, life will not run well. The three principles in *Dalihan Na Tolu* include: 1) *Sombah Marhula-hula*, which means showing respect to *hula-hula*, if one shows respect to his/her guest by treating the guest like *hula-hula*, he/she will be respected as well; 2) *Manat Mardongan Tubu*, which means showing tolerance to family of the same merge; 3) *Elek Marboru*, which means showing empathy or affection to *anak boru*. Nevertheless, *Dalihan Na Tolu* can also inhibit tourism as stated by Sihaloho (2017) saying that in the event that *Dalihan Na Tolu* provides real contribution, this will inhibit tourism because the principle of tourism states that guests or newcomers, in this case tourists, are considered as *hula-hula*, while the host is considered as *anak boru*.

Conversely, the Parbaba community actually consider tourists as *boru* because they are newcomers while the local sare *hula-hula* because they are the ones who established the village. Anyone who comes must respect them as the host, not on the contrary in which it is those tourists who should be respected. In addition, characters of the Batak peoples are very different from those of people from Solo and Jogjakarta, for example if tourists ask a discount on the stuffs they sell, but finally do not buy them, they will get angry. Actually, *Dalihan Na Tolu* should play a role here, i.e. to change it, but the regional government in this case the Department of Culture and Tourism never gives any instruction on this issue.

One's position in *Dalihan Na Tolu* will also affect his/her everyday life. Someone who happens to have a position in the government but in *Dalihan Na Tolu* his/her position is as *anak boru* will feel hesitate to reprimand his/her *hula-hulanya* even though his/her *hula-hulanya* has made a mistake. In so doing, the implementation of the principle *Dalihan Na Tolu* can also hinder the development of tourism.

Discussion

Solutions to the Factors that Inhibit Development of Parbaba White Sand Tourism

In relation to the inhibiting factor from the locals, especially the condition where garbage scattered everywhere, there should be a Village Regulation stipulating that the village community should throw away their garbage to garbage cans, which applies for both organic and inorganic waste, and then it should also stipulate waste recycle, which later can be used for fertilizer, and garbage collectors must come every 2 days, rather than every 2 weeks to take the garbage to the landfill. This village regulation will also stipulate the so-called „garbage levy” that villagers must pay each month along with the sanctions given to those villagers who fail to comply with this Village Regulation. As for the issue of villagers' livestock that still roam everywhere, the Government of Samosir Regency the Tourism Office will directly meet the community to introduce and distribute information about the Regional Regulation No. 26 of 2006 concerning the obligation to put livestock in a cage and/or watch them. To individual business owners such as tents, hotels, boats, and so on, they are expected to control their own business well and pay the income tax to the Government of Samosir Regency, as so far they have not done it. Even the Chief of Huta Bolon Village adds that the owner of Hotel Raja in Parbaba White Sand Beach and owners of restaurants here, if they are invited to attend “*Musrembang*”, they never come. Thus, it is hard to expect that they will pay the 10% tax on meals and levies on lodging (Sihaloho, 2017). Manurung (2017) states the Tourism Office of the Government of Samosir Regency states that in the last 3 years, tourism in Samosir Regency has made

progress as can be seen in the increasing number of visitors every month and participation of the Government of Samosir Regency cq the Tourism Office, for example by:

1. Establishing tourism-aware groups (*Pokdarwis*).
2. Controlling the price set by providers of facilities such as hotels, restaurants (culinary), personal tents, boats, and so on.
3. Organizing events for 1 year.
4. Participating in the exhibition held in Jakarta, by joining brand travel (between sellers and buyers)
5. Conducting travel dialogue in Jakarta (Manurung, 2017).

According to Limbong (2017), the Office of Culture and Sport of Samosir Regency often hold art galleries although he claims that the dance "*si lima peak*" originated in this area, however presently they have to bring dancers from another region (Dairi) if they want to present the dance because it no longer exists in this area (not preserved) (Limbong, 2017). Japito Sinaga argues that the time has come for *Dalihan Natolu* to adopt the principle called *Poda na lima* in each occasion/ meeting such as in the traditional marriage ceremony, death ceremony, and so on, namely:

1. *Paias rohamu* (clean your heart)
2. *Paias pamatangmu* (clean your body)
3. *Paias paheanmu* (clean your clothes)
4. *Paias bagasmu* (clean your house)
5. *Paias pakaranganmu* (clean your yard) (Sinaga, 2017).

Subdistrict Chief Nainggolan later adds that literally the meaning can also be interpreted as follows: that we need to clean our soul, body, clothes worn/covering our body, house (family), and yard (the environment where we live).

Paia Roam (clean your heart/soul) means no dirt found and can also mean the purity of the soul from envy (*gut-gut*), jealousy, and arrogance. Maintaining the cleanliness and purity of the soul is a good advice in order that we can always maintain a good relationship with God, others, and the environment (nature) rationally and proportionally in accordance with the needs of mankind today and at a later time. Characters such as envy, jealousy, and arrogance will ruin the cleanliness and purity of the human soul. On the contrary, sincerity, sportsmanship, and simplicity will bring humanity to their level of honour. *Paia Pamatangmu* (clean your body) tells us to always maintain the cleanliness of our body physically and cleanliness of our behaviour from various evil deeds. To have a good body, people need a good intake and a good lifestyle as well. The word *pamatang* (body) here can be interpreted to include maintenance of the whole body as well as the five senses that encourage people to do good or evil deeds. By maintaining cleanliness of the body, people will be able to control the behaviour and politeness and avoid various damage resulting from their actions.

Paia Pamatangmu (clean your body) tells us to always maintain the cleanliness of the clothes both physically, i.e. clothes that cover *aurat* (parts of the body that should be covered by clothes so that they cannot be seen by the opposite sex) or clothes that means the symbols we wear accompanying our life such as *marga* (descendants), *huta* (village), customs, and so on. *Paia Pamatangmu* (clean your body) tells us to always maintain the cleanliness of the house itself and the house which is interpreted as *bagas* or the family (descendants). In the customs of the Batak peoples, the definition of *bagas* (house) is very broad as it is not only defined as a place to stay but can also is interpreted as *sappopparan* (the same ancestor/the same marga/family by blood) and everyone has the duty to protect and maintain family prestige and dignity. *Bagas* can also mean family. *Paia Pakaranganmu* (clear your yard) means we must always maintain the cleanliness

of the environment where we live. In the narrow sense, a yard can mean the yard of the house or the environment where we live (*huta*). Usually, in one *huta* (village), especially in the land of the Batak peoples, most of the residents living in one village remain having close kinship. Generally, in one village there is always a family relationship that is often referred to as *Dalihan Na Tolu*, which the kinship system in the customs of the Batak peoples. A yard can also be interpreted as *Dalihan Na Tolu*, namely *Sauhut (kahanggi)*, *Anak Boru dohot Morana (hula-hula)*. It will be really wise if those advised from grandfathers/grandmothers (*oppu*) of the Batak peoples are implemented nowadays as some people no longer care about morality in their life.

CONCLUSIONS AND SUGESTION

The local community in this case the community of Huta Bolon Village, Pangururan Subdistrict, Samosir Regency remain lacking tourism awareness, as evidenced by the facts where garbage scattered everywhere and livestock roamed everywhere, despite the enactment of the Regional Regulation No. 26 concerning the obligation to put livestock in a cage and/or watch them. The role of *Dalihan Natolu* in enhancing the tourism appeal of Parbaba White Sand in Samosir Regency as a National Geopark on the one hand is instrumental in changing the behaviour of the local community by socializing *Poda Na Lima* (clean your soul, body, clothes, house, and yard) on each occasion such as in traditional marriage celebration, death ceremony, and so on, but on the other hand it is also considered inhibiting the development of tourism itself because it considers the local community as *hula-hula* and visitors/tourists or newcomers as *boru* whom should not be respected or served, contrary to the concept of tourism in which it is visitors whom they should serve as these visitors provide revenue to their village. In relation to the solutions to the development of Parbaba White Sand, it is necessary to establish a Regional/Village Regulation setting out types of organic and inorganic waste, temporary disposal site, final disposal site, and sanctions. The regional regulation concerning collection of taxes on hotels, restaurants, private tent owners, private board owners, parking fees, and the like should be stipulated in such a way that later those types of collection will be returned for the welfare of the local community so as to instil a view that they have to maintain the cleanliness of the beach for the sake of their own prosperity.

REFERENCES

- Allan, M., Dowling, R. K., & Sanders, D. (2015). The motivations for visiting geosites: the case of Crystal Cave, Western Australia. *GeoJournal of Tourism and Geosites*, 16(2): 141-152.
- Carvache-Franco, M., Carvache-Franco, O., Carvache-Franco, W., Villagómez Buele, C., & Arteaga Peñafiel, M. (2018). The Tourist Demand from The Perspective of The Motivation, Assessment and Satisfaction In A Sun And Beach Destination: The Manta Case, Ecuador. *GeoJournal of Tourism and Geosites*, 22(2): 561-572.
- Chakrabarty, P., & Mandal, R. (2018). Geotourism Mapping for Sustainability: A Basin Oriented Approach. *GeoJournal of Tourism and Geosites*, 21(1): 174-185.
- Coratza, P., Ghinoi, A., Piacentini, D., & Valdati, J. (2008). Management of geomorphosites in high tourist vocation area: an example of Geo-hiking maps in the Alpe di Fanes (Natural Park of Fanes-Senes-Braies, Italian Dolomites). *Geojournal of tourism and geosites*, 2(2): 106-117.
- Daulay, A.S. (2006). *Indigenous Batak Culture Dalihan Na Tolu: Analysis from the Angle of Principles and Their Importance in Integrating Integration and National Identity*, <http://marbun.blogspot.com/2006/11/dalihan-na-tolupenjelasan.html>. (Accessed on 16.07.2017).
- Daulay, A.S. (2006). *Indigenous Cultural Batak Dalihan Na Tolu: Analysis From The Corner of Principles and Its Urgency in Knitting Integration and Identity of the Nation*. <http://marbun.blogspot.com/2006/11/dalihan-na-tolupenjelasan.html>. (Accessed on 16.07.2017).
- Du, Y., & Girault, Y. (2018). A Genealogy of UNESCO Global Geopark: Emergence and Evolution. *International Journal of Geoheritage and Parks*, 6(2): 1-17.

The Role of Dalihan Na Tolu in Enhancing the Tourism Appeal of Parbaba White Sand Beach in Samosir Regency as Indonesia's National Geopark

- Egresi, I., & Polat, D. (2016). Assessing tourists' satisfaction with their shopping experience in Istanbul. *GeoJournal of Tourism and Geosites*, 9(2): 172-186.
- Fandeli, C. (2010). *Understanding and Basic Concept of Ecotourism*. Faculty of Forestry Universitas Gadjah Mada Press. Yogyakarta.
- Fandeli, C., & Nurdin, M. (2005). *Conservation-Based Ecotourism Development in the Park*. UGM Publishers. Yogyakarta.
- Harahap, S. (1987). *Orientation of Values of Batak Culture*, Willem Iskandar Studio, Publishers. Jakarta.
- Kolosinska, M., Petrashchak, O., Kolosinskyi, I., & Katana, A. (2018). Tourism Sector in Transition Economy On Example of Ukraine: Determinants of Competitiveness. *GeoJournal of Tourism and Geosites*, 21(1): 239-252.
- Limbong, P. (2017). The Office of Culture and Sport of Samosir Regency. *Working Paper*. Medan.
- Lu, J. & Nepal, S.K., (2009). Sustainable tourism research: an analysis. *Journal of Sustainable Tourism*, 17(1): 5-16.
- Manurung, P.N.J.H. (2017). Head of the Office of Tourism of the Government of Samosir Regency, *Working Paper*. Medan.
- Marbun, M.A. & Hutapea, I.M.T (1987). *Batak Cultural Dictionary Toba*, Balai Pustaka Publishers. Jakarta.
- Marbun, M.A. & Hutapea, I.M.T. (1987). *Toba Batak Cultural Dictionary*, Balai Pustaka Publishers. Jakarta.
- Mossa, A., Camúñez-Ruiz, J. A., & Morandi, F. (2018). Current State of The First UNESCO Global Geopark: A Case Study of The Geological And Mining Park Of Sardinia, Italy. *GeoJournal of Tourism and Geosites*, 22(2): 403-418.
- Naibaho, O. (2017). Vice Chief of FKTM of Samosir Regency Chapter. *Working Paper*. Medan.
- Nainggolan, S.R. (2010). The Existence of Indigenous Cultural Batak Dalihan Na Tolu in Batak Society (Case Study of Batak Perantau Society in Brebes Regency). *Journal of Philosophy*, 18(2): 8-19.
- Nikolova, V., & Sinnyovsky, D. (2019). Geoparks in the legal framework of the EU countries. *Tourism Management Perspectives*, 29(1): 141-147.
- Pardede, F. & Purnama, R.E. (2016). Management Strategy of Samosir Regency as Nature Tourism Attraction in North Sumatera Province. *Tourism Destinations Journal*, 4(1): 5-15.
- Perdana, P.P. (2013). *Related statements about the quality of Human Resources*. <http://properti.kompas.com/read/2013/12/13/2121222/Indonesia.Kini.Punya.Lima.Taman.Bumi> (Accessed on 16.07.2017).
- Ruban, D.iA., & Yashalova, N.N. (2018). Geodiversity meanings in global geoparks: an empirical study. *Environmental Earth Sciences*, 77(22): 771-785.
- Siahaan, N. (1982). *Dalihan Na Tolu Adat: Principles and Implementation*. Grafina Publishers. Jakarta.
- Sihaloho, B.B. (2017). Chief of Huta Bolon Village. *Working Paper*. Medan.
- Sihaloho, L. (2017). Resident of Huta Bolon Village. *Working Paper*. Medan.
- Sihombing, T.M. (1986). *Batak Philosophy on Customary Habits*, Balai Pustaka Publishers. Jakarta.
- Simpson, M.C., (2007). An integrated approach to assess the impacts of tourism on community development and sustainable livelihoods. *Community Development Journal*, 44(2): 186-208.
- Sinaga, J. (2017). Member of FKTM of Nainggolan Subdistrict Chapter, *Working Paper*. Medan.
- Sinaga, J. (2017). Secretary of the Chief of Palipi Subdistrict, *Working Paper*. Medan.
- Sinaga, R. (2000). *Indigenous Cultural Batak and Christianity*. Main Dian Publishers. Jakarta.
- Siregar, Junita. (2017). Chief of Nainggolan Subdistrict, *Working Paper*. Medan.
- Sitanggang, H. (1986). *Impact of Modernization on North Sumatra's Family Relationship*, Depdikbud Project Inventory and Documentation of Regional Culture. Jakarta.
- Sitanggang, H. (1986). *The Impact of Modernization on Regional Relationship of North Sumatra*, Depdikbud Project Inventory and Documentation of Regional Culture. Jakarta.
- Štrba, L. (2015). Identification and evaluation of geosites along existing tourist trail as a primary step of geotourism development: Case study from the Spiš region (Slovakia). *GeoJournal of tourism and geosites*, 16(2): 126-140.
- Tomori, M. (2010). Investigating shopping tourism along the borders of Hungary: A theoretical perspective. *GeoJournal of Tourism and Geosites*, 6(2): 202-210.
- *** Republic of Indonesia (2003). *Law Number 36 Year 2003, Establishment of Samosir Regency and Serdang Bedagai Regency in North Sumatra Province*. Jakarta.
- *** Republic of Indonesia (2006). *Regulation No. 26 of 2006 about Regional regulation stipulating the obligation Regional*. Jakarta.
- *** Republic of Indonesia (2016). *Regulation of North Sumatera Governor No. 34 of 2015 about Toba Caldera Geopark*. Medan.
- *** UNEP-UNWTO, (2005). *Making tourism more sustainable. A guide for policy makers*, URL: <http://scholar.google.com/scholar?hl=en&btnG=Search&q=intitle:Making+Tourism+More+Sustainable:+A+Guide+for+Policy+Makers#0>. (Accessed on 16.07.2017).
- *** UNWTO, (2004). *Indicators of Sustainable Development for Tourism Destinations*. URL: <http://scholar.google.com/scholar?hl=en&btnG=Search&q=intitle:Making+Tourism+More+Sustainable:+A+Guide+for+Policy+Makers#0>. (Accessed on 16.07.2017).

Submitted:
26.11.2018

Revised:
16.07.2019

Accepted and published online
02.08.2019

MOTIVATIONS AND SATISFACTION OF VOLUNTEER TOURISM FOR THE DEVELOPMENT OF A DESTINATION

Mauricio CARVACHE-FRANCO

Espíritu Santo University-Ecuador, Av. Samborondón,
Samborondón 092301, Ecuador, e-mail: mauricio2714@hotmail.com

Wilmer CARVACHE-FRANCO*

ESPOL Polytechnic University, Escuela Superior Politécnica del Litoral, ESPOL,
Faculty of Social Sciences and Humanities, Campus Gustavo Galindo Km 30.5 Vía Perimetral,
P.O. Box 09-01-5863, Guayaquil, Ecuador, e-mail: wcarvach@espol.edu.ec

Daniel CONTRERAS-MOSCOL

ESPOL Polytechnic University, Escuela Superior Politécnica del Litoral, ESPOL, i3lab
Entrepreneurship and Innovation Center, Campus Gustavo Galindo Km 30.5 Vía Perimetral,
P.O. Box 09-01-5863, Guayaquil, Ecuador, e-mail: dcontrer@espol.edu.ec

Luis ANDRADE-ALCIVAR

Agricultural Polytechnic Superior School of Manabí – ESPAMMFL. Department of Tourism,
10 de agosto #82 and Granada Centeno Street Calceta, Ecuador, e-mail: luisandrade70@hotmail.com

Orly CARVACHE-FRANCO

Catholic University of Santiago de Guayaquil, Faculty of Business Specialties,
Av. Carlos Julio Arosemena Km 1.5, Guayaquil, Ecuador, e-mail: orly.carvache@cu.ucsg.edu.ec

Citation: Carvache-Franco, M., Carvache-Franco, W., Contreras-Moscol, D., Andrade-Alcivar, L., & Carvache-Franco, O. (2019). MOTIVATIONS AND SATISFACTION OF VOLUNTEER TOURISM FOR THE DEVELOPMENT OF A DESTINATION. *GeoJournal of Tourism and Geosites*, 26(3), 714–725. <https://doi.org/10.30892/gtg.26303-391>

Abstract: Volunteer tourism as a contribution to society can improve various aspects of a destination such as the economy and society itself. The present empirical study analyzes the behavior of the volunteer tourist in relation to their motivations and satisfaction in their stay. The study was conducted in situ in the province of Manabí in Ecuador, a destination that was hit by an earthquake in April 2016, where volunteer tourists arrived to help with the reconstruction. The study was quantitative, a questionnaire was used, and factor analysis was used as a data reduction technique. The results show that the main motivational factor for which they arrived was "Professional and social development", followed by "Values and self-esteem". The evaluation of the overall satisfaction of this activity was high, which demonstrates the potential of this type of tourism for the destination. The vast majority of tourists would repeat and recommend a volunteer trip. The types of tourism most made during their stay were the community-based tourism, and sun and beach. Findings are useful for organizations that work with volunteers to take into account within their programs.

* Corresponding author

Key words: Volunteer, factors, satisfaction, motivation, earthquake, Ecuador.

* * * * *

INTRODUCTION

The activity of volunteering is not common in all human beings, it is praiseworthy to establish it as something innate that allows volunteers to give themselves to provide welfare to others because they feel the desire to empathize with the pain of others, but the reality differs partially from this thought, since according to studies volunteers are also motivated by experiencing new situations and / or generating job opportunities (Akintola, 2010; Barron & Rihova, 2011; Chen & Chen, 2011). Volunteer tourism is implementing a volunteer mission to support responsible tourism facilities (Khetagurova et al., 2018).

In effect, it represents a large segment of the market coming from an alternative tourism modality, making it easier to connect two realities and taking trips for mainly altruistic reasons, but also motivations that translate into better job opportunities and experiences, booming mainly among tourists from developed countries that are heading towards developing countries with great emphasis on the African continent. In this context, on April 16, 2016 on the north coast of the province of Manabí in Ecuador, the epicenter of an earthquake of 7.9 degrees on the scale of Richter caused human and material losses mostly in the provinces of Manabí and Esmeraldas. In the northwestern region of South America several plates converge: Caribbean, South American, Coco, Pacific, Nazca. According to official data from the Secretariat of Risk Management of Ecuador and National Secretariat of Planning and Development SENPLADES (2016), this quake caused the death of 661 people, around 30,000 people were lodged in shelters, more than 80,000 left the site and economic losses are estimated at more than 3,000 million dollars.

The living conditions of the local population, especially of Manabí and south of Esmeraldas, were seriously affected, considering that previously SENPLADES (2016) had declared as a prioritized district the compound by the Jama and Pedernales cantons for the high levels of poverty and the lack of basic services and public infrastructure. It should be noted that the provinces of Esmeraldas and Manabí have historically been isolated from the social and economic development of the country, which has kept the region in a state of chronic socioeconomic depression that was terribly increasing with the earthquake. In this sense, activities such as trade, agriculture, livestock, fishing, small industry and tourism were affected. Thus, tourism was affected in coastal communities such as Pedernales, Caráquez Bay, Manta and Canoa, among others. Non-residents arrived at the destination to contribute with humanitarian support and reconstruction.

Since the 90s, the destination Manabí where the current research work was carried out, became a benchmark for exotic sun and beach tourism in Ecuador that attracts national and foreign visitors currently. After the telluric event, it was observed the involvement of different type and origin of organizations and specially people who without being tourists saturated the few rooms available for lodging and became part of the new urban landscape configured by huge spaces of tents and camps.

Disaster relief organizations, organizations sponsored by international organizations, organizations sponsored by national and foreign private companies, as well as local organizations of residents and natives, came to the city of Manabí to collaborate in various activities and maintain an economic activity on the site. The main aim of this empirical research is to analyze the motivations of a group of volunteer tourists and their satisfaction, establish findings on this subject and contribute to the state of the art.

THEORETICAL FRAMEWORK

What really motivates a person to give their time and energy for causes that benefit other people through volunteering are diverse and intriguing. However, knowledge and understanding of this topic is of great interest to authors and administrators in charge of the selection process and recruitment (Esmond & Dunlop, 2004).

There is no doubt that a new trend of travel is emerging and is linked to abandon mass tourism with its 3 S (sea, sand, sun) and focus on a different kind of tourism, alternative tourism (Gezici, 2006). Volunteer tourism is one of the types of tourism with the highest growth rates (Wearing & McGehee, 2013) with around 1.6 million volunteers spending close to 2 billion dollars annually during the last decade (Wilkinson et al., 2014). This segment of volunteer tourists is characterized by the fact that its participants tend to be mainly young people under 35, with a high level of education and female (Hallmann & Zehrer, 2016; Grimm & Needham, 2012; Jackson & Adarlo, 2014).

From a conceptual point of view, volunteer tourism is defined as an activity carried out by tourists during their holidays in an organized manner, seeking to achieve objectives such as: reduce poverty, help a particular group, investigate aspects of the environment or community that allow their conservation (Wearing, 2001). Likewise, authors like Sherraden et al. (2008) reflect on this activity as a contribution to society that exceeds the geo-political limits of the countries. It is also defined as a relationship of exchange where volunteers offer time, skills and energy in exchange for experiences (Hallmann & Zehrer, 2016). Certain controversy arises on the part of Mostafahanezhad (2013) who comments that it is a neoliberal practice theme that seeks the justification of North American countries, individuals and organizations in the development of South American countries. In this perspective, since the 1970s, studies on volunteering and its motivation gained strength, going back to the 1980s where conjectures and assumptions were asked whether motivations belonged to altruistic purposes or personal fulfillment. Authors such as Morrow-Howell & Mui (1989) found that adults are encouraged to carry out this type of activities mainly for a humanitarian sense and secondly for personal fulfillment, which encouraged the scientific community to the emergence of two models: the one-dimensional and the multifactorial, but in spite of that the volunteers apparently are not aware of their main motivations (Cnaan & Goldberg-Glen, 1991).

Later in 2004, one of the largest studies (2,444 participants) in formal research on motivations and volunteering conducted by Esmond and Dunlop (2004) was carried out in Australia, which involves the development of the volunteer motivation inventory. Based on that study, it was found that people do not carry out help activities because of their busy lives and the fact that organizations need to ensure that their time will be rewarded in improving the lives of others. In addition to these, three important aspects could be identified related to the meaning of volunteering: values, reciprocity and recognition (Esmond & Dunlop, 2004). Then, the study carried out by Akintola (2010) in Africa provides more information, in this case about a group of volunteers destined to give attention to disease where it was found that their main motivation really had altruistic purposes such as concern for others and community. However, authors such as Barron and Rihova (2011) have identified that a large percentage of people volunteered for the purpose of improving their resume and having more opportunities in their careers. Likewise, in a study carried out in China by Chen and Chen (2011) after surveying volunteers, they identified that their main motivations were to experience authenticity, and interaction with local people and culture, which correspond to a more selfish or personal sense than altruistic one. Additionally, Wright (2013), after analyzing the perceptions, recognizes that there is still doubt on the part of the participant and guest

about whether the true purpose of volunteering is altruism or personal purposes. Currently, Polus and Bidder (2016) agree that obtaining new experiences is more important than altruism when volunteering. On the other hand, Fuentes-Moraleda et al. (2016) conclude that interaction with different cultures and personal enrichment are the main reasons for moving towards solidarity activities, unlike the professional development that in this study was one of the least valued attributes. An additional study carried out among medical students who volunteered their services as medical volunteers identified that their main motivations revolved around the opportunities and the context of the trip as such, leaving aside the simple fact of giving their time to help the others (Rovers et al., 2016). In contrast to the motivations few studies have been carried out to analyze the impact of volunteer tourism in the community or on the experience of the participant (Hallmann & Zehrer, 2016). For Han et al. (2019) the motivations of voluntary tourism contributed significantly to the creation of positive images, to the induction of satisfactory experiences and to the trust in a volunteer tourism organization. In this framework, the question arises of what are the motivational factors for voluntary tourism and what is the degree of satisfaction during the stay in a destination.

STUDY AREA

To the west of Ecuador is situated the province of Manabí where Canoa is located, which is a small urban area of almost 200 years old. Currently it belongs to the territorial jurisdiction of the San Vicente canton.

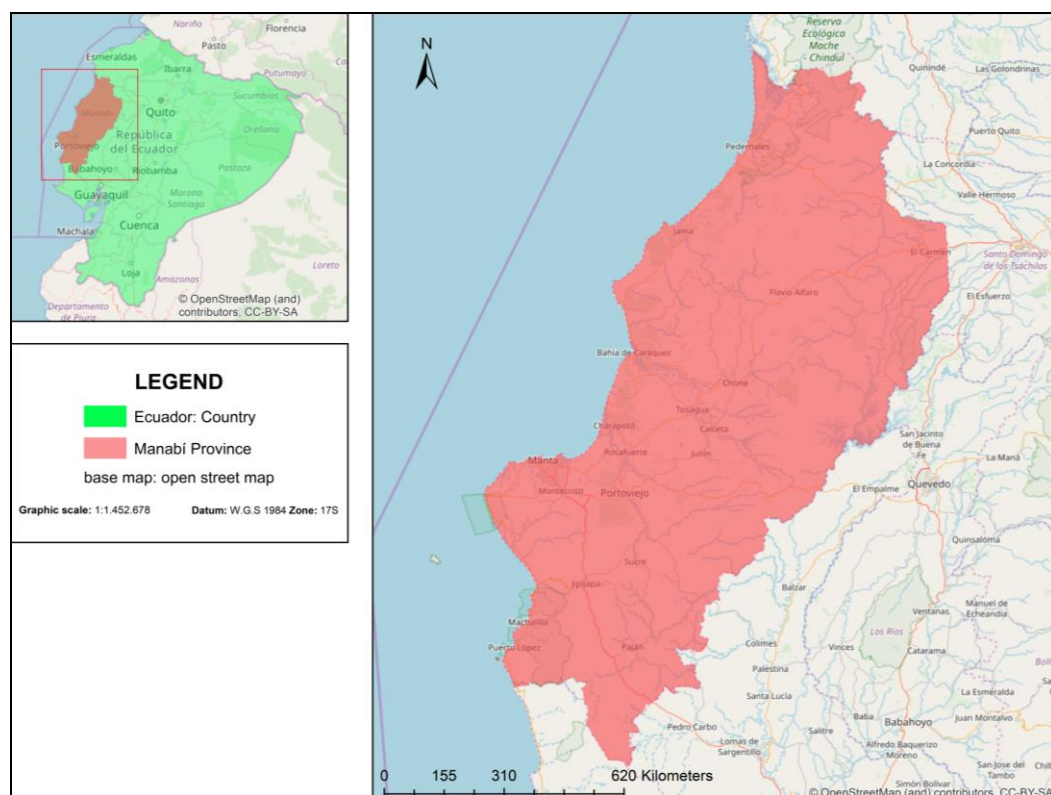


Figure 1. Geographical location of the province of Manabí (Ecuador)

Geographically, it is on the northern edge of a wide beach with more than 5 km long, this beach is between the mouth of the Briceño river and a double mouth of the Canoa and Muchacho rivers where approximately 5,000 inhabitants live. Towards the north of the town, a rocky cliff formation begins that penetrates several kilometers in the Pacific Ocean in northwest direction, having like culminating point the Past Cape that constitutes a referent of navigation, referential limit of the Caráquez Bay and of the encounter of the currents of Humboldt and the Child The majority of the population is concentrated in Canoa where they coexist with a population of non-native residents dedicated to tourism and a floating population and constant flows of tourists. In the rural area the Montubia culture and a minority Afro descendant are evident in its population. (Figure 1).

METHODOLOGY

The present empirical study was based on a field study, for which a questionnaire was used based on different previous studies (Esmond & Dunlop, 2004; Fuentes-Moraleda et al., 2016) where there are validated questionnaires on the subject of the volunteer tourism.

Table 1. Motivations of volunteer tourists

Factors	Volunteer Motivations
Career Development	I volunteer because volunteering gives me an opportunity to build my work skills.
	I volunteer because I feel that I make important work connections through volunteering.
	I volunteer because I feel that volunteering will help me to find out about employment opportunities.
Recognition	Being appreciated by my volunteer agency is important to me.
	Being respected by staff and volunteers at the agency is not important to me.
	I feel that it is important to receive recognition for my volunteering work.
Social Interaction	I volunteer because I look forward to the social events that volunteering provides me.
	I volunteer because I feel that volunteering is a way to build one's social networks.
	I volunteer because volunteering provides a way for me to make new friends.
Reciprocity	I volunteer because I believe that what goes around comes around.
Empathy	I like to help people, because I have been in difficult positions myself.
	Volunteering gives me a chance to try to ensure people do not have to go through what I went through.
	I often relate my volunteering experience to my own personal life.
Self-Esteem	I volunteer because volunteering makes me feel like a good person.
	I volunteer because volunteering makes me feel useful.
	I volunteer because volunteering keeps me busy.
Social	I volunteer because people I'm close to volunteer.
	I volunteer because people I know share an interest in community service.
Values	I volunteer because I am concerned about those less fortunate than myself.
	I volunteer because I am genuinely concerned about the particular group I am serving.
	I volunteer because I feel it is important to help others.
Under-standing	I volunteer because volunteering allows me to gain a new perspective on things.
	I volunteer because volunteering lets me learn through direct hands-on experience.
	I volunteer because I can learn how to deal with a variety of people.
Protective	I volunteer because doing volunteer work relieves me of some of the guilt for being more fortunate than others.
	I volunteer because volunteering is a good escape from my own troubles.
	I volunteer because no matter how bad I am feeling, volunteering helps me forget about it.

The methodology provided by Esmond and Dunlop (2004) was used to adapt an appropriate survey for the destination and then the factorial analysis was applied as a data reduction technique, useful to explain the correlations between the variables observed in terms of a lower number of non-observed variables called factors (Table 1) The survey consisted of 14 questions, technically organized in three sections. The first section, the sociodemographic information of the tourists was required.

The second section focused on the volunteer motivations and in the third section the survey dealt with the visit satisfaction. Thus, closed-ended, multiple-choice questions were used with a 5-point Likert scale to assess opinions of respondents.

The field work was carried out during the months of July to September 2016 in the Province of Manabí in Ecuador (Localities: Canoa, Chone and Pedernales). The condition that the respondents had to meet were: That they were doing volunteer work, that they are not residents of the province of Manabí and that they are over 18 years of age. The personnel in charge of carrying out the surveys were students of ESPAM University Tourism Faculty. The questionnaire was filled in independently and the team of pollsters was very attentive to answer any questions from the respondents. In order to find errors and improve the survey, a pilot test was conducted with 20 surveys during a day to validate the questionnaire. A mixture of question techniques was used to try to obtain the most approximate results. 170 questionnaires were applied, of which 154 questionnaires were valid with a margin of error of $\pm 8\%$, a confidence level of 95% and a variance of 50%. In the current research an infinite population as a sample was used because there was no official study to determine the number of volunteers who arrived in the province of Manabí (Ecuador). A representation of our sample design is presented in Table 2. SPSS Statistics software version 22 for analytical purposes was used in the current study.

Table 2. Sample design

Population	Volunteers
Geographical area	Province of Manabí (Ecuador). Localities: Canoa, Chone, Pedernales.
Data collection date	July-September 2016
Type of sampling	Simple random sampling
Confidence level	95%
Margin of error	$\pm 8\%$
Valid questionnaires	154

RESULTS AND DISCUSSION

For a better understanding, the results of this study have been divided into four parts: Profile of the respondent, characteristics of the trip, motivations, and degree of satisfaction.

Socio-demographic characteristics of volunteer tourist

According to the responses in the survey, the sample was composed of foreign volunteers (53%) and Ecuadorian volunteers (47%). Regarding the gender, the 50 % of volunteers were men and the remaining 50% were women. Furthermore, the most representative group was formed between 20 to 29 years with 51.9%, and between 30 to 39 years with 31.2%. In relation to marital status of the respondents, the most representative groups were single (81.8%) and married (9.1%). The majority of respondents had university studies (68.2%) (Table 3). Regarding the type of academic studies, 24.10% were related to engineering, followed by Management with 12.8% and tourism with 12.8% and then followed by Social Sciences with a 9.8%.

Tourist experience and characteristics of the volunteer trip

In the current study 51.9% made a trip on their own, while 48.1% made a trip with the assistance of an NGO. The majority group, 29.2% had participated more than 3 times

in volunteer activities, followed by 27.7% who had never been volunteering. The vast majority, 51.3%, spent more than a week in Manabí. Regarding the volunteer activities carried out in the destination during their stay, the majority of volunteers (43.10%) devoted themselves to "civil constructions", followed by "teaching workshops" (11.8%) and "pet care" (11.1%). Among the types of tourism that the volunteers had experienced during their stay, community-based tourism (56,205) and sun and beach tourism (47.70%) were the most in demand, which shows the potential of this destination to have these types of tourism highly appreciated by volunteers. The question was of multiple answer and, therefore, the sum of the result is superior to 100%.

Table 3. Socio-demographic characteristics of volunteer tourist

Demographics	Categories	n	Percentage
Origin N=154	National	72	47.0
	Foreign	82	53.0
Age group N=154	Under 20	9	5.8
	20 - 29	80	51.9
	30-39	48	31.2
	40-49	13	8.4
	50-59	4	2.6
Gender N=154	Male	77	50.0
	Female	77	50.0
Marital Status N=154	Single	126	81.8
	Common Law Marriage	8	5.2
	Widowed	2	1.3
	Married	14	9.1
	Divorced	4	2.6
Education level N=154	Primary education	4	2.6
	Secondary education	13	8.4
	University education	105	68.2
	Postgraduate	32	20.8

Table 4. Type of tourism practised during the trip

Type of tourism	Percentage	Ranking
Community-based tourism	56.2	1
Sun and beach	47.7	2
Nature tourism	39.9	3
Cultural tourism	37.9	4
Experience-based tourism	24.2	5
Adventure tourism	21.6	6

Motivations of volunteer tourists

One of the main objectives of this study is to know the motivations of volunteer tourists. For this, a Likert scale of 5 points was designed (1 being unimportant and 5 being very important). The Cronbach's Alpha coefficient is 0.890, which indicates a commendable internal consistency among the elements of the scale.

Factor analysis

A factor analysis was carried out and it allowed to extract seven dimensions of motivation in the volunteer tourists. The analysis of main components has been used as a technique to reduce data. The Varimax rotation method was used, in order to obtain a

clearer interpretation of the factors, so that each of them had only very high or low factor loads. The factors that had higher values than 1.00 were selected. Seven factors are part of the solution and represent 68.5% of the total variance. The results are shown in Table 5.

Table 5. Rotated component matrix

Factors	Component						
	1	2	3	4	5	6	7
FACTOR 1: Social and professional development							
I volunteer because I feel that I make important work connections through volunteering.	0.879						
I volunteer because I feel that volunteering will help me to find out about employment opportunities.	0.827						
I volunteer because volunteering gives me an opportunity to build my work skills.	0.736						
I volunteer because I feel that volunteering is a way to build one's social networks.	0.509						
I volunteer because volunteering provides a way for me to make new friends.	0.504						
I volunteer because I look forward to the social events that volunteering affords me.	0.427						
FACTOR 2: Values and Self- Esteem							
I volunteer because I feel it is important to help others.		0.805					
I volunteer because I am concerned about those less fortunate than myself.		0.802					
I volunteer because I am genuinely concerned about the particular group I am serving.		0.741					
I volunteer because volunteering makes me feel useful.		0.483					
I volunteer because volunteering makes me feel like a good person.		0.438					
FACTOR 3: Empathy							
Volunteering gives me a chance to try to ensure people do not have to go through what I went through.			0.87				
I often relate my volunteering experience to my own personal life.			0.831				
I like to help people, because I have been in difficult positions myself.			0.756				
I volunteer because I believe that what goes around comes around.			0.453				
FACTOR 4: Protective							
I volunteer because volunteering is a good escape from my own troubles.				0.858			
I volunteer because no matter how bad I am feeling, volunteering helps me forget about it.				0.785			
I volunteer because doing volunteer work relieves me of some of the guilt for being more fortunate than others.				0.749			
I volunteer because volunteering keeps me busy.				0.494			
FACTOR 5: Understanding							
I volunteer because volunteering allows me to gain a new perspective on things.					0.746		

I volunteer because I can learn how to deal with a variety of people.					0.733		
I volunteer because volunteering lets me learn through direct hands-on experience.					0.704		
FACTOR 6: Social							
I volunteer because people I know share an interest in community service.						0.861	
I volunteer because people I'm close to volunteer.						0.798	
FACTOR 7: Recognition							
Being appreciated by my volunteer agency is important to me.							0.61
I feel that it is important to receive recognition for my volunteering work.							0.61
Eigenvalues	7.398	3.05	2.467	1.752	1.36	1.3	1.14
% explained variance	27.402	11.3	9.136	6.49	5.04	4.9	4.21
% accumulated variance	68.486						
KMO	0.794						
Bartlett test of sphericity	Chi-square = 2040.056.sig < 0,001						
Extraction method: Principal component analysis. Rotation method: Varimax with Kaiser							

According to the results of Table 5, the KMO index was greater than 0.75 and the Barlett sphericity test is therefore significant that the model is adequate. The first factor was called "Professional and social development" and is the factor with the greatest explanatory capacity (27.4%) of the total variance. This factor was associated with the motivations related to the opportunity to make connections and find opportunities to employment, building work skills and social relationships, making new friends and waiting for social events, similar findings were found (Barron & Rihova, 2011; Chen & Chen, 2011; Polus & Bidder, 2016; Rovers et al., 2016). The second factor was called "Values and self-esteem" and explained 11.3% of the total variance. This factor was related to the motivations for helping others, for concern for the less fortunate, because volunteering makes respondents feel useful and like a good person. In the study by Esmond & Dunlop, (2004) the "Values" factor was found as first. The third factor was called "Empathy" and explained 9.14% of the total variance. This factor was related to the motivations for trying to ensure that people do not have to go through what I went through, to relate my experience as a volunteer to my own personal life, because I have been in difficult positions too, because I believe that what goes around comes around.

The fourth factor was called "Protective" and explains 6.5% of the total variance. This factor was related to the motivations because, volunteering is a good escape from my own problems, because no matter how bad I feel, volunteering helps me to forget, because doing volunteer work relieves me from the guilt of being more fortunate than others, because volunteering keeps me busy. The fifth factor was called "Understanding" and explained 5.04% of the total variance. This factor was related to the motivations because it allows me to get a new perspective on things, because I can learn to deal with a variety of people, because it allows me to learn through direct hands-on experience.

The sixth factor was called "Social" and represented for 4.9% of the total variance. This factor was related to the motivations because the people I know share an interest in community service and because the people close to me are volunteers. The seventh factor was called "Recognition" and represented for 4.2% of the total variance. This factor was

related to the motivations for feeling appreciated by my volunteer agency, it is important for me and because I feel it is important to receive recognition for my volunteer work.

Degree of satisfaction and loyalty of the tourist with the volunteer trips

The overall satisfaction rating was high with an average of 4.32 out of a total of 5, which shows that the volunteer tourist was satisfied during his stay in this destination. Results similar to (Fuentes, 2016). Thus, 94.1% of respondents would repeat a trip for volunteer reasons, while 5.9% said they would not do it again. In addition, 97.40% would recommend to other people to carry out this type of trips with volunteer motivations.

As for whether their expectations were met on the trip, 94.1% of respondents answered yes, while 5.9% answered no. It was also asked if they would continue making these volunteer trips for which 93.5% answered yes, while 6.5% answered no.

Table 6. Expectation of the trip and degree of satisfaction

Variable	n	Percentage
Very satisfied	87	56.3
Satisfied	48	31.3
Neither Satisfied nor Dissatisfied	15	9.7
Unsatisfied	4	2.8
Very unsatisfied	0	0.0

The relation that exists between the volunteers who fulfilled their expectation on the trip and the degree of satisfaction in their stay is shown in table 6. The results of Table 6, show that 56.30% of volunteers, were very satisfied in this destination, so there was a high percentage of volunteers who got what they expected on this trip.

CONCLUSIONS

Among the conclusions it is possible to emphasize that the volunteer tourism represents an activity organized so that a specific group of tourists realize during their vacations in the pursuit of objectives such as: to reduce the poverty, to help a group in particular, to investigate aspects of the environment or community that allows its conservation (Wearing, 2001). Since the 1970s, this activity has gained strength as a reason for research, have been discussing whether it is altruism or a selfish sense that encourages tourists to do this activity. The latest research highlights the role of ego-enhancement or personal sense as the main motivation for opting for this type of tourism (Chen & Chen, 2011; Wright, 2013; Polus & Bidder, 2016; Rovers et al., 2016).

Regarding the motivational dimensions, the findings show that the factors found in this destination using factorial analysis as a statistical technique, are seven: Professional and social development, values and self-esteem, empathy, protective, understanding, social, and recognition. Likewise, the findings show that the main factor in volunteer arrival is "Professional and social development" and is the factor with the greatest explanatory capacity (27.4%) of the total variance (Barron & Rihova, 2011; Chen & Chen, 2011; Polus & Bidder, 2016; Rovers et al., 2016).

The second factor that volunteers come to this destination is "Values and self-esteem" that explains (11.3%) of the total variance. Likewise, Esmond and Dunlop (2004) in their research found that the "Value" factor was the main factor. These findings contribute to the theoretical implications, that the volunteer tourist mainly travels for "professional and social development", this factor is associated to the motivations related to the opportunity to make connections and find employment opportunities, for building job skills and social relationships, for making new friends

and waiting for social events. Regarding the voluntary activities carried out in the destination, the majority of volunteers were engaged in "civil constructions", followed by "teaching workshops" and "pet care". The types of tourism that volunteers mainly carry out during their stay are: "community tourism" and "sun and beach tourism", which shows the potential of this type of tourism in this destination.

The general satisfaction assessment is high with an average of 4.32 out of a total of 5, which shows the potential of this destination for volunteer tourism (Fuentes, 2016). The vast majority of respondents would repeat and recommend a trip for voluntary reasons, which suggests a loyalty of the volunteer tourist to the destination where he has collaborated, showing that the perception of the value of visiting a destination or participating in a specific type of travel strongly influences the future intention of travelers to return to the same destination or to participate again in a similar travel experience (Petrick, 2004). The 56.30% of volunteers were very satisfied in this destination, which denotes a relation between satisfaction and volunteering.

As practical implications, the study shows results that will help Manabi province (Ecuador) as a destination to continue with volunteer tourism as a development strategy for the reconstruction of this territory that is an area affected by the earthquake of 2016. Finally, it was found that the main limitation of the present study is its temporality. As a future line of research, it is suggested to apply the methodology recommended in Table 4, applying the seven factors obtained in the factor analysis in the same destination with the volunteers who keep coming to contrast the results and contribute to the state of art on this subject.

REFERENCES

- Akintola, O. (2010). What motivates people to volunteer? The case of volunteer AIDS caregivers in faith-based organizations in KwaZulu-Natal, South Africa. *Health policy and planning*, 26(1), 53-62. <https://doi.org/10.1093/heapol/czq019>.
- Barron, P., & Rihova, I. (2011). Motivation to volunteer: a case study of the Edinburgh International Magic Festival. *International Journal of Event and Festival Management*, 2(3), 202-217. <https://doi.org/10.1108/17582951111170281>.
- Chen, L. J., & Chen, J. S. (2011). The motivations and expectations of international volunteer tourists: A case study of "Chinese Village Traditions". *Tourism Management*, 32(2), 435-442. <https://doi.org/10.1016/j.tourman.2010.01.009>.
- Cnaan, R. A., & Goldberg-Glen, R. S. (1991). Measuring motivation to volunteer in human services. *The journal of applied behavioral science*, 27(3), 269-284. <https://doi.org/10.1177/0021886391273003>.
- Esmond, J., Dunlop, P. (2004). Developing the volunteer motivation inventory to assess the underlying motivational drives of volunteers in Western Australia.
- Fuentes-Moraleda, L., Muñoz-Mazón, A., & Rodríguez-Izquierdo, S. (2016). Responsible tourism as an instrument for local development: a case study to analyze the main motivations for tourists. *Cuadernos de turismo*, 227-242. <http://dx.doi.org/10.6018/turismo.37.256221>.
- Gezici, F. (2006). Components of sustainability: Two cases from Turkey. *Annals of Tourism Research*, 33(2), 442-455. <https://doi.org/10.1016/j.annals.2005.11.002>.
- Grimm, K. E., & Needham, M. D. (2012). Moving beyond the "I" in motivation: Attributes and perceptions of conservation volunteer tourists. *Journal of Travel Research*, 51(4), 488-501. <https://doi.org/10.1177/0047287511418367>.
- Hallmann, K., & Zehrer, A. (2016). How do perceived benefits and costs predict volunteers' satisfaction? *VOLUNTAS: international journal of voluntary and nonprofit organizations*, 27(2), 746-767. <https://doi.org/10.1007/s11266-015-9579-x>.
- Han, H., Meng, B., Chua, B. L., Ryu, H. B., & Kim, W. (2019). International volunteer tourism and youth travelers—an emerging tourism trend. *Journal of Travel & Tourism Marketing*, 36(5), 549-562. <https://doi.org/10.1080/10548408.2019.1590293>.

- Jackson, L., & Adarlo, G. (2016). Bridging cultures through unpaid labor: US volunteer teachers' experiences in China's Yunnan Province. *VOLUNTAS: International Journal of Voluntary and Nonprofit Organizations*, 27(5), 2330-2352. <https://doi.org/10.1007/s11266-014-9519-1>.
- Khetagurova, V. S., Kryukova, E. M., Maloletko, A. N., Kaurova, O. V., Mosalev, A. I., Mukhomorova, I. V., & Egorova, E. N. (2018, December). Volunteer Tourism as a Variety of Responsible Tourism. In IOP Conference Series: Earth and Environmental Science (Vol. 204, No. 1, p. 012015). IOP Publishing. <https://iopscience.iop.org/journal/1755-1315>.
- Morrow-Howell, N., & Mui, A. C. (1989). Elderly volunteers: Reasons for initiating and terminating service. *Journal of Gerontological Social Work*, 13(3-4), 21-34. http://dx.doi.org/10.1300/J083V13N03_03.
- Mostafanezhad, M. (2013). The politics of aesthetics in volunteer tourism. *Annals of Tourism Research*, 43, 150-169. <https://doi.org/10.1016/j.annals.2013.05.002>.
- Petrick, J. F. (2004). The roles of quality, value, and satisfaction in predicting cruise passengers' behavioral intentions. *Journal of travel research*, 42(4), 397-407. <https://doi.org/10.1177%2F0047287504263037>.
- Polus, R. C., & Bidder, C. (2016). Volunteer Tourists' Motivation and Satisfaction: A Case of Batu Puteh Village Kinabatangan Borneo. *Procedia-Social and Behavioral Sciences*, 224, 308-316. <https://doi.org/10.1016/j.sbspro.2016.05.490>.
- Rovers, J., Japs, K., Truong, E., & Shah, Y. (2016). Motivations, barriers and ethical understandings of healthcare student volunteers on a medical service trip: a mixed methods study. *BMC medical education*, 16(1), 94. <https://doi.org/10.1186/s12909-016-0618-0>.
- Secretariat of Risk Management of Ecuador (2016). Report. Quito-Ecuador.
- National Secretariat of Planning SENPLADES (2016). Report. Quito-Ecuador.
- Sherraden, M. S., Lough, B., & McBride, A. M. (2008). Effects of international volunteering and service: Individual and institutional predictors. *Voluntas: International Journal of Voluntary and Nonprofit Organizations*, 19(4), 395. <https://doi.org/10.1007/s11266-008-9072-x>.
- Wearing, S. (2001). Volunteer tourism: Experiences that make a difference. New York: Cabi.
- Rattan, J. K. (2015). Is certification the answer to creating a more sustainable volunteer tourism sector? *Worldwide Hospitality and Tourism Themes*, 7(2), 107-126. <https://doi.org/10.1108/WHATT-12-2014-0047>.
- Wearing, S., & McGehee, N. G. (2013). Volunteer tourism: A review. *Tourism Management*, 38, 120-130. <https://doi.org/10.1016/j.tourman.2013.03.002>.
- Wilkinson, B., McCool, J. P., & Bois, G. (2014). Volontourism: An analysis of the online marketing of a fast-growing industry. *International journal of communication and health*, 2(4), 10-15. <http://communicationandhealth.ro/upload/number4/WILKINSON-MCCOOL-BOIS.pdf>.
- Wright, H. (2013). Volunteer tourism and its (mis) perceptions: A comparative analysis of tourist/host perceptions. *Tourism and Hospitality Research*, 13(4), 239-250. <https://doi.org/10.1177/1467358414527984>.

Submitted:
26.03.2019

Revised:
17.07.2019

Accepted and published online
13.08.2019

IMPROVING THE BENEFITS OF KARAMBA INTO TOURISM ACTIVITIES: AN EFFORT TO REDUCE THE ECOLOGICAL IMPACT OF AQUACULTURE IN MANINJAU LAKE, INDONESIA

Firdaus FIRDAUS *

STKIP PGRI Sumatera Barat, Department of Sociology Education,
Padang Utara-25173, Indonesia, e-mail: firdaus@stkip-pgri-sumbar.ac.id

Nurus SHALIHIN

UIN Imam Bonjol Padang, Faculty of Ushuluddin and Religious Study,
Department of Religions, Kuranji-25153, e-mail: nurus_djamra@yahoo.com

Dian Kurnia ANGGRETA

STKIP PGRI Sumatera Barat, Department of Sociology Education,
Padang Utara-25173, Indonesia, e-mail: anggreta14@gmail.com

Faishal YASIN

STKIP PGRI Sumatera Barat, Department of Sociology Education,
Padang Utara-25173, Indonesia, e-mail: faishalyasin@gmail.com

Rio TUTRI

STKIP PGRI Sumatera Barat, Department of Sociology Education,
Padang Utara-25173, Indonesia, e-mail: rio_tutri@yahoo.com

Citation: Firdaus, F., Shalihin, S., Anggreta, D.K., Yasin, F., & Tutri, R. (2019). IMPROVING THE BENEFITS OF KARAMBA INTO TOURISM ACTIVITIES: AN EFFORT TO REDUCE THE ECOLOGICAL IMPACT OF AQUACULTURE IN MANINJAU LAKE, INDONESIA. GeoJournal of Tourism and Geosites, 26(3), 726–736. <https://doi.org/10.30892/gtg.26304-392>

Abstract: The aim of this study is to explore the potential extending of floating net cage (known as *karamba* in local term) benefits as tourism attractions. By extending the benefit of *karamba* as a tourism attraction, the impact of aquaculture to lake ecology and quality of water can be reduced. In the last decade, tourism has evolved into sustainable tourism activity by making nature and culture as primary object. Therefore, tourism is also trusted can be overcome the ecological problems of Maninjau lake that caused by *karamba* aquaculture. The research was conducted in nagari around the Maninjau lake area during 2016-2017. Data were collected through semi-structured interviews and focus group discussions. The results indicate that *karamba* has the potential to be developed as a tourism activity through the participation of *karamba* practitioners as tourism operators. However, the type of participation cannot be entirely spontaneous type, but induced participation type is also needed to develop the *karamba* tourism. Several strategies and challenges in developing *karamba* tourism are identified.

Key words: *karamba* tourism, sustainable tourism, participation

* * * * *

* Corresponding author

INTRODUCTION

The area of Lake Maninjau is a valley beneath the group of hills around the lake which in folklore is the remnant of Mount Tinjau eruption. This lake is listed as the eleventh largest lake in Indonesia as well as the second largest lake in West Sumatera (Firdaus, 2018). The lake is called Maninjau having an area of 129, 69 km² (BPS Agam, 2017). Lake Maninjau has been famous for one of the tourist destinations in West Sumatera which has green view and is supported by other tourism potentials, such as *kelok 44* (bend of 44). Apart from being tourist destination, Lake Maninjau is also used by local community as an area of fish aquaculture by employing floating net cage (Keramba Jaring Apung/KJA) since 1991 (Yodi, 2017). In local term, the aquaculture system is known as *karamba* (*this term is used hereinafter*).

Karamba in Lake Maninjau was began with a trial done by Fisheries Agency of West Sumatera in 1991 with a total of 17 plots (Yodi, 2017). Good economic value was push the fish aquaculture grow rapidly from 12 plots in 1992 (Asnil, 2012) to 17.226 plots in 2016 (BPS Agam, 2017). In addition to economic value, the existence of *karamba* also affects the ecology of the lake. The ecological impact is called *tubo belerang* (natural upwelling) by the local society which results in death of the fish since 1997 (Saputra, 2015; Yodi, 2017). Natural upwelling causes the decrease of quality of lake water characterized by strong odor causing itch to the skin and bloom of disturbing alga, particularly *Microcystis aeruginosa* (Asnil, 2012; Saputra, 2015).

Phenomenon of *tubo belerang* has become a threat for *karamba* in Lake Maninjau area since the last 20 years (Asnil, 2012). Moreover, it has been an annual threat for fish farmers causing them to lose much money since the last 10 years. Besides, based on the Local Regulation number 5, 2014 concerning with Lake Maninjau Conservation Processing, the number of KJA in Maninjau has exceeded the capacity of the lake. Based on the Local Regulation, the capacity of the lake is only 6.000 plots, while the number of KJA in 2016 is 17.226 plots (BPS Agam, 2017). This condition implicates to the sedimentation of the lake which mainly causes the fish to die harming *karamba* farmers.

Economically, business of *karamba* has provided more money for community of Nagari living in Lake Maninjau. Nasution et al., (2011) states the average net profit earned by *karamba* in Lake Maninjau with total capital of Rp. 10.203.600 is worth Rp. 2.396.400 (Nasution et al., 2011). Such profit is equivalent to 23, 4% of the total venture capital. However, the ecological impact caused by aquaculture activity has threatened ecology of the Lake as well as economic viability of the farmers. In addition, the damage of the environment also implicates to public health exposed by polluted lake (Nasution et al., 2011; Saputra, 2015). In response to the ecological impact affecting economy and community health, *karamba* begins to limit. The restriction cused the number of *karamba* has not increased since 2015 to 2016 (BPS Agam, 2017). However, as an important livelihood for local people, these restrictions have implications for the income of farmers. This paper offers alternative economic activities through tourism to preserve the lake while still utilizing *karamba* facilities as a means of tourism activities.

According to UNEP & UNWTO (2005), tourism hold a special position to contribute in order to create sustainable development and it's challenges. The position is due to two things, first is the dynamic and growth of tourism and the contribution to the economic of many contries and local destination. Second, tourism involves consumer (visitors), the industry, the environment and local communities to the special relationship because the visitors travel to the producer and product. This leads to important and unique aspect of the relationship between tourism and sustainable development, that is interaction, awareness and dependency.

LITERATURE REVIEW & THEORITICAL FRAMWORK

Historically, the tourism in Indonesia is not separated from the alternative policy to deal with the limitation of natural resources. Tourism activity that has been going on since colonial era (Picard, 2005; Spillane, 1987) becomes the priority of development during the New Order era because of the decrease of oil role as a foreign exchange earner and the decline of export value in the non-oil sector. On the other hand, the potential to develop tourism is very high (Spillane, 1987; Yoety, 2008a). Indonesia's tourism development policy is stated in Law number 9, 1990 concerning with Tourism which stipulates that Indonesia's Tourism is sustainably directed through optimizing the cultural aspects. Specifically, Presidential Instruction number 9, 1969 affirms that the development of Indonesia's tourism aims at economic, social, cultural and natural conservation interests (Firdaus & Tutri, 2017). Development of tourism in the last decades has been shifting from mass tourism to niche tourism which means that the tendency to travel on a mass changes into trend to travel individually preferring to see objects and tour attractions of special interest as well as ecotourism (Yoety, 2006).

At the same time, the policy of national tourism development is directed to special interest tourism (Kementrian & Pariwisata, 2015). Several alternative tourist attractions concerning with ecotourism and local activities begin to grow and develop in Indonesia (Firdaus & Tutri, 2017). The contribution of natural tourism in Batusuhunan to socio economic and environment sustainability (Hijriati & Mardiana, 2014), economic contribution of Sambi Tourism in the form of increasing public income and emerging new business opportunities (Sudarmadji & Darmanto, 2014) as well as economic benefit of marine tourism development in Sikakap, Mentawai (Andriyani et al., 2012) are forms of tourism contributions for the society in Indonesia.

The ecotourism growth trend is also part of sustainable tourism development known as ecotourism. Although the concept still overlaps between conventional tourism category on one hand and alternative tourism category on the other, it is part of sustainable tourism because of its contribution towards sustainable development and sustainability (Björk, 2007). In addition, ecotourism also closely relates to pro-poor tourism and volunteer tourism (Wearing & Neil, 2009). Therefore, tourism activity can be categorized as an environmentally friendly alternative economic activity. In expressed simply, WTO defined sustainable tourism as tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities (UNEP & UNWTO, 2005:12).

Base on the definition, UNEP & UNWTO (2015) state the principals of sustainability is refer the environmental, economic and socio-cultural aspects of tourism development, and a suitable balance between the three dimensions to guarantee its long-term sustainability. For this reason, the sustainable tourism should make optimal use of environmental resources that constitute a key element in tourism development, maintaining essential ecological processes and helping to conserve natural resources and biodiversity. *Second*, respect the socio-cultural authenticity of host communities, conserve their built and living cultural heritage and traditional values, and contribute to inter-cultural understanding and tolerance. Third, ensure viable, long-term economic operations, providing socio-economic benefits to all stakeholders that are fairly distributed, including stable employment and income-earning opportunities and social services to host communities, and contributing to poverty alleviation. Lozano-Oyola et.al., (2012:659) state that sustainable tourism is not a specific tourism, but more an approach that can be used to make all type of tourism more environmentally, socially and economically beneficial. Thus, Word Tourism Organization define the the sustaibale tourism as meet the needs of present tourist and host regions

while protecting and enhancing opportunities for the future (WTO, 2001). In this manner, the connections between economic development, environmental protection and social equity, each element reinforcing the other is an important aspect of tourism development (Zolfani et al., 2015). In this manner, tourism activities should be focused on resource management in which all economic, social and aesthetic requirements are fulfilled, while simultaneously respecting cultural integrity, essential ecological processes, biological diversity and life support systems (Lozano-Oyola et al., 2012).

To integrate the environmental, social and economic benefits from tourism, community engagement is a prerequisite in tourism development. Van Niekerk (2014:82) identified three schools of thought about community participation in tourism. *First*, considers that under the best condition, most people tend to avoid community participation. *Second*, recognizes that community participation is a voluntary process in which the community will only engage in destination planning and development when doing so is likely to benefit them. *Third*, argues that the community often wants to participate in destination development but is rarely provided the opportunity to do so effectively. Therefore, the development of tourism destinations should ensure the community engagement in all processes of planning in which communities involved have ample opportunities to participate if they want to (Zhao & Ritchie, 2007). According to Cevat Tosun (1999), there are three typologies of community participation on the tourism development process: spontaneous, induced and coercive. Spontaneous participation is voluntary, based up without external support. It represents an ideal mode of participation, as it mirrors a voluntary and autonomous activity on the part of people to handle their problem without government or other external agencies' help. Induced participation is sponsored, mandated, and officially endorsed. It's also known as formal, top-down, passive participation or pseudo participation. Coercive participation is compulsory, manipulated, and controlled. It's also known as community oppressive and narrow participation. This typology of participation will be used as an analytical framework in the development of *karamba* fish aquaculture as a special interest tourism activity.

METHODOLOGY

Population and Participant

Lake Maninjau is administratively located in Tanjung Raya Sub district of Agam Regency, West Sumatera. To reach the research area, one must take around 3-4 hours drive from Minangkabau International Airport at Padang (the capital of West Sumatera Province). Selecting the right participants in Maninjau with appropriate experience and knowledge about the area and fish aquaculture was essential for effective and efficient data collection (Gillham, 2005). Thus, we applied the purposive sampling method to select the participant, as this method is able to precisely deliver the researcher to the right informant in the process of data collecting (Suri, 2011). To gain complete information, we interviewed the local and regional government, community leaders, youths and businessmen of *karamba*. The particular criteria of informant were chosen to provide insight to Lake Maninjau area as a whole. The participants were chosen because their knowledge of the Lake Maninjau area, their involvement in development of area, and as actors in *karamba* aquaculture. Thus, they are familiar and close to Lake Maninjau development issues and activities of *karamba* aquaculture and its social, economic and environmental impacts. The traditional Minangkabau language has been used during interviews to encourage trust and comfort from all participants based on their local knowledge and wisdom without having to force them to find equivalent words in other languages (Bahasa and/or English). Interview data in Minangkabau were then translated into Indonesian, and then translated to English for the purposes of this publication.

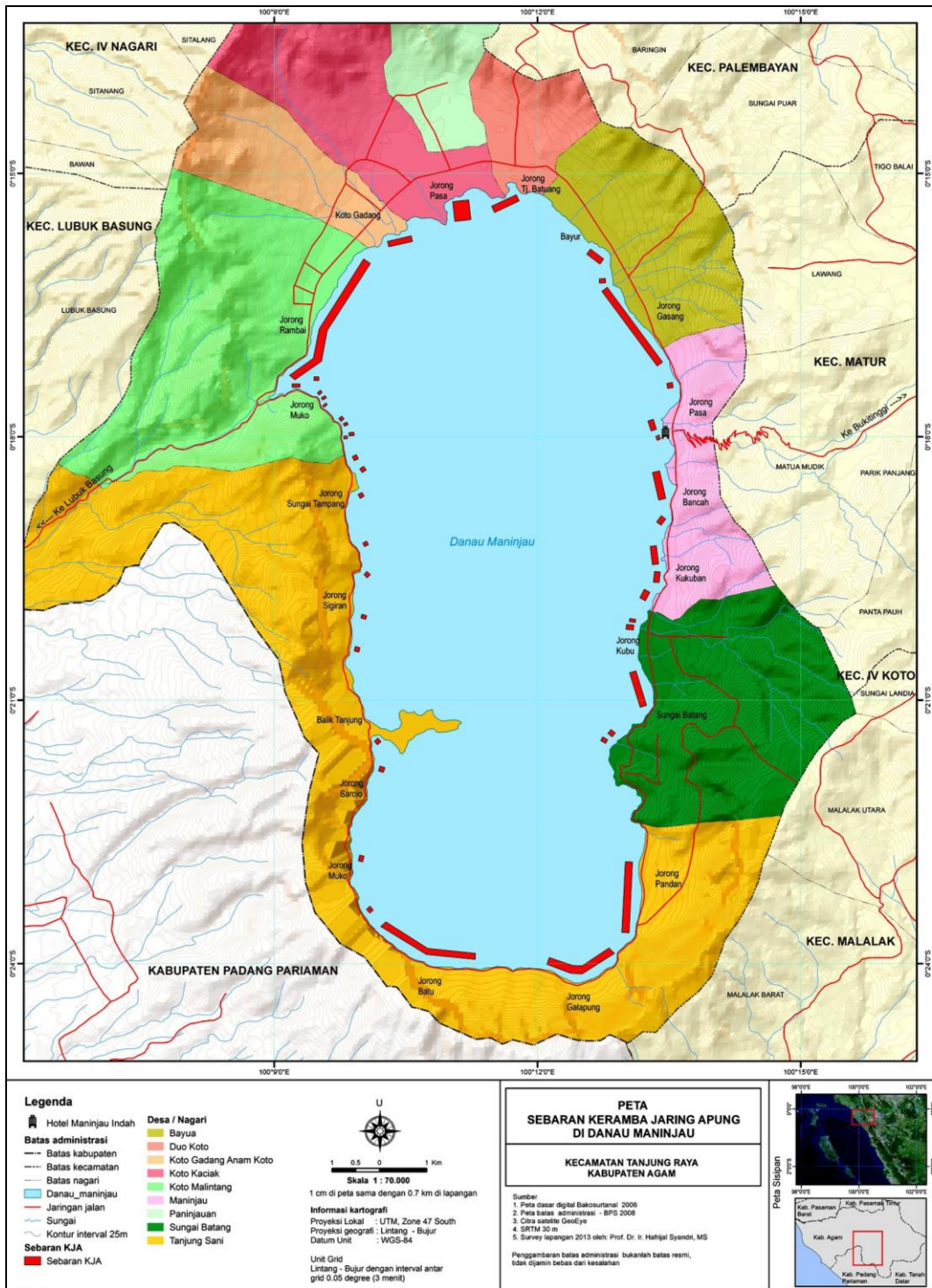


Figure 1. Map of Tanjung Raya sub-district, the of study area (Source: Syandri et al., 2014)

Data Collection Methods

In-depth interviews and focus group discussions (FGD) were used to gain the better information for the purpose of this study. We conducted semi-structured interview (approximately 1-2 hours for each person) with 25 informant (2 government tourism office of Agam district, 2 sub-district government, 3 Walinagari (village head), 5 community leader, 5 youth and youth leaders, and 10 businessmen of *karamba*). Focus Group discussion (FGD) lasting for 2 hours with 12 participant (owner and worker of aquaculture *karamba*) and 1 youth leader. Semistructured interview and FGD were chosen because it's provide opportunities for researchers to probe and explore the information needed by asking further questions or asking participant to explain their answers or elaborate their response (Silverman, 2013). Data collection conducted from 2016 to 2017 in Nagari around Lake of Maninjau at subdistrict of Tanjung Raya, Agam Regency, West Sumatera, Indonesia. Semi-structured interview conducted during several field visits in 2016 and 2017. Intensive visits were made at the end of 2016 and early 2017. FGD conducted in Mei 2017 in Nagari Maninjau. Most of the focus group participants is owner of *karamba* and obtained a high school education.

One of them has a graduate education and former of community empowerment facilitator. The entire FGD participants were young people who were active in various youth activities at the Nagari level. In addition, study document in the form of policy, activity report, research result and others became secondary data sources of this study. Observation was carried out by following the routine of fish farming activities conducted by fish farmers. The activities were then documented through photos and videos.

Data Analysis

Data analysis is done by listening to the interviews and FGDs recording, and then transcribing them in table system according to question and answer. The transcripts of interview and FGD data then processed through indentifying and grouping the information according to the themes of research topic. Then, the entire data were analyzed by using data reduction/data verification, data display and data interpretation which is then used to make conclusion (Miles & Huberman, 1992). After that, the result of data analysis was presented in the form of narration in accordance to the need of writing.

RESULTS DISCUSSIONS

Lake Of Maninjau Area and Tourism Potential

As mentioned above, Lake Maninjau area is included in the administrative area of Tanjung Raya sub-district in Agam Regency, West Sumatera, Indonesia. The sub-district having an area of $\pm 244.03 \text{ Km}^2$ consists of nine *Nagari* surrounding the lake. Tanjung Raya generally has tropical weather with varying temperatures between 23° C to 26° C having an average air temperature of 24° C . The altitude of the area is between 100-1000 masl with type C of climate which is located between $100^\circ 05' - 100^\circ 16' \text{ E}$ and $0^\circ 12' - 0^\circ 23' \text{ S}$. The distance from Capital of Sub district to Capital of Regency (Lubuk Basung) is 29 km, in which the average time to get there by using vehicle is + 30. Meanwhile, the distance to get to the capital of Province (Padang) is 143 km which takes + 3 hours to arrive there.

Topography of the sub district consists of steep hills and valleys and is crossed by four rivers, such as Tumayo, Amparan, Kurambik which flows from the hills to Lake Maninjau, and Batang Antokan as the exit of Lake Maninjau water flow. Apart from having 4 rivers, Tanjung Raya is also surrounded by 10 hills with an average height of above 1200 masl. The hills are Silayang, Asahan, Kurambik, Gadang, Rangkiang, Ampang Sikikih, Air Singsang, Surian, Tanjung, Sikakal Dewi. In general, there are three tourism potentials in Lake Maninjau including natural potential, historical relic and cultural

potential (Table 1). Through its potential, Lake Maninjau belongs to tourism development area of A which means it has the second largest number of tourists after Java and Bali with chief products in the form of mountainous nature and Malay culture (Tim Konsorsium, 1997). In the provincial level, Lake Maninjau is one of the priority areas of tourism development. The Tourism Development Master Plan (RIPP) of Agam Regency in 2003 decides that Lake Maninjau is the central tourism development I (WPP I).

The WPP I includes tourism activity in Tanjung Raya emphasizing on the development of natural tourism, history, art and culture consisting of 2 SKW. Tourism development in Tanjung Raya is directed at; Natural tourism, Marine tourism and Cultural & scientific tourism (Tourism, Art and Culture Official of Agam, 2003).

Table 1. Tourist Attractions and Tourism Potentials of Lake Maninjau (Data source: Firdaus, 2018)

Category	Tourist Attractions/Tourism Potentials		Information
Natural Tourism	Lake Maninjau		
	Kelok 44		Curving road which is in good condition
	Aia tigo raso		Managed by society
	Cikalo waterfall		The management is not good yet
	Muko-muko tourist park		Managed by society
	Aia angek swimming pool		Managed by society
	Gadiah rantih waterfall		The management is not good yet
Tours of Heritage	Museum of Buya Hamka's birthplace		Good management
	Inyiak DR's (Buya Hamka's father) library		Good management
	Grave and birthplace of Inyiak DR		Good management
Cultural Potential	Art	<i>Tambua tansa</i> music Talempong music Traditional self-defense art Traditional dance of Minangkabau <i>Debus</i> (ritual display of invulnerability)	Available in each village especially <i>tambua-tansa</i>
	Daily Activities	Hunting pig Hunting mouse Wedding party Fish cultivation by using KJA	Available in each village
	Traditional Activities	Wedding ceremony <i>Mangaji tamaik</i> ritual	Available in each village

Potency of *Karamba* as Tourism Attraction in Lake Maninjau

Karamba in Lake Maninjau area is a series of patterned activities routinely conducted by fish farmers. The patterned activities generally comprise the process of fish breeding, maintenance and harvesting. The fish breeding is the process of maintaining fish seeds by using small pore nets in *karamba*, where previously fish seeds were purchased from seed cultivator. The process is done when the fish age 3-5 weeks. During the process, the seeds of fish are filtered which are then transferred to medium pore net. The screening process takes place in several stages based on growth of the seeds. Maintenance is daily activities which consist of feeding fish, picking up dead fish (carcasses) and separating fish based on its size. The feeding fish is carried out every morning and evening with special food for freshwater fish cultivation for 3-4 months. The Harvesting is an activity to lift fish from *karamba*, in which the activity is carried out in groups consisting of lifting fish from *karamba* to the place of pigging, weighing fish, packing them with oxygen and bringing them to the truck carrier.

Karamba aquaculture is done in the middle of the lake with a minimum depth of 15 m. Hence, the majority of *karamba* is placed in the middle of the lake, in which to

access the *karamba*, it is needed special transportation. The transportation used to get *karamba* is a river craft without outrigger. The daily activities to cultivate fish by using river craft as a means of transportation starts from sowing seeds of fish, bringing food for fish, feeding them until harvesting. Thus, activities of fish farmers always involve the use of the river craft. Furthermore, in *karamba*, the farmers provide small huts as a storage place of fish food. Besides, there is a bridge connecting one plot to another or one *karamba* to another, in which the bridge usually can be passed by at least 2 adults simultaneously. The series of activities in the process of fish cultivation are potential things which can be used as tourism activities, in which they can be managed into packets consisting of series of activities. Main activities in the packets are sailing by using river craft and feeding the fish. Sailing by using the river craft is an activity that is not experienced by many people, especially those living in mountains and in urban areas without beach. Thus, the activity of exclusive sailing becomes special experience for visitors.

Besides, feeding fish in the cages (*karamba*) will also provide a unique experience for the visitors. Throwing fish food into the cages in the middle of the lake which is then raided by thousands of fish simultaneously becomes a relaxation for the visitors. Aside from being part of daily activities included in culture category, *karamba* is very close to nature. The proximity includes activities relating to natural resources. Therefore, in the context of tourism, the activities embrace cultural activities and other activities concerning with nature. Thus, *karamba* can be developed into cultural and natural tourism activities by packaging them into special interest tourism activities. The activities of using river craft without outrigger and feeding fish over the lake are main tour activities with the principle of sustainable tourism. Other additional activities can be developed in accordance with the need of tourists and the ability of the managers. The main principle of this activity is to prioritize natural aspects rather than imitations and to prioritize activities that tourists are invited to see and to watch nature closely, to enjoy its authenticity, to learn, to admire the beauty of nature, flora and fauna including cultural aspects (Pendit, 2006; Yoety, 2008b). Through the principle, tourism activities are integrated with the activity of fish cultivation done by the society. Thus, tourism activities simultaneously empower the fish farmers. The process of empowerment can be accomplished through the principle of social development, in which society becomes the main actor (Firdaus, 2016).



Figure 2. Picture of Some *Karamba* Tourism Activities (Source: Primary Data, 2017)

Karamba is part of cultural tourism potential as well as natural tourism. Culture in this case refers to the definition proposed by Edward B. Taylor which consists of knowledge, belief, art, moral, law, custom and capability and other habits as members of

society (Saifuddin, 2005). Meanwhile, the concept of culture is a tourism that connects certain activity with places, traditions, arts, ceremonies, and experiences photographing a nation and its people with a certain identity that is different from the tourists (Hughes, 2002; McKercher, 2002). The concept of natural tourism is a tour activity used to enjoy the beauty of nature which involves the elements of education, understanding, and support to the efforts of environmental conservation and the involvement of local communities around ecotourism destination areas in its management (Arida et al., 2014).

Development of *Karamba* Tourism; Strategies and Its Challenges

Basically, *karamba* is a daily activity carried out by local communities that has the potential to be developed as a tourist attraction. This potencies is to make all aquaculture activities –from fish breeding to harvest- as a tourist attraction. These activities mainly ride the river craft from the edge of the lake to the *karamba* in the middle of the lake and feed the fish. However, in the local community this potential has not been made an opportunity, so no *karamba* tourism activities carried out until this research was conducted. Nevertheless, in the FGD activities all participants were enthusiastic to develop *karamba* as a tourist attraction. This enthusiasm became as the basic capital to development of *karamba* as tourism activity with a participatory approach through community engagement. Because the main of tourist attraction is ride the river craft and feed the fish at *karamba*, the development of *karamba* tourist attractions must involve the participation of *karamba* practitioners. This is to make sure that they are skilled people in cultivation activities especially in controlling river craft with loads of goods and passengers on the lake.

In addition, the requirement is applied to ensure that the activity is not merely created for the tourism interest. The type of participation is spontaneous participation in according Tosun (1999), is the participation with some characteristics included bottom-up; participation in whole process of development including decision making, implementation, sharing benefit and evaluating; self planning; and wide participation. By using these characteristics, the process of developing *karamba* tourism is fully handed to *karamba* practitioners starting from the planning, implementation, and monitoring and evaluation process. The practitioners can also develop networks widely with various stakeholders from various circles in developing *karamba* tourism. By using unstructured and unofficial day to day interactions between members of local communities and local leaders in spontaneous participation (Tosun, 1999), community participation can be encouraged through create a group of *karamba* tourism. The member of group is formed from the *karamba* practitioner.

Through the group, all actors of tourism activity can be controlled and they can supervise each other. Besides, through the group, activities of tourism can also be designed and members of the group can decide various rules relating to the persistence of the activities. In addition, the management and its development *karamba* tourism can be integrated with other tourism activities in Lake Maninjau area (Firdaus, 2018).

Although the opportunity to participate in the development of *karamba* tourism by practitioners is very high, there are two challenges in its development, human resources, infrastructure an safety standard. Human resource constraints are mainly related to the managerial and innovation capabilities of practitioners in developing *karamba* tourism. However, this can be overcome by involving universities or tourism agencies to upgrade the capabilities of practitioners in terms of management and innovation of *karamba* tourism. Even though it takes time, this can be done quickly through intensive training and mentoring. The second obstacle relates to infrastructure of lake. There is no dock that can be used around the lake by practitioners to tether or climb biduk before pedaling to the middle of the lake. Usually, the practitioners use a shallow edge of the lake to climb the boat and push it to the lake. Automatically, every ride on a river craft the practitioners will get wet. For practitioners, this is normally, but not for tourist purposes. For tourist service standards, a dock must be available to raise and lower tourists from river craft.

The third is related to safety standard on ride the river craft. Usually, practitioners have not used buoys as safety on ride of river craft to go to karamba at the middle of the lake. Traditionally, they still rely on swimming skill if there is an accident.

This is does not apply to tourists who cannot be sure to have the ability to swim in the lake. Therefore, the availability of safety is a necessity.

In FGD, even though the enthusiasm for developing *karamba* tourism was quite high, participants considered infrastructure and security standards to be the biggest obstacle in developing *karamba* tourism. The challenge of the dock infrastructure, they can overcome by determining the location that can be used as a dock, but they collide with the constraints of the source of the cost to build the dock. Likewise with the security standards, they assess the cost of completing security equipment in driving river craft is quite high because they have to provide a minimum of 2 sets for every 1 river craft that should be used by them and passengers. To overcome the financial constraints in building the dock and security equipment, they hope to government to provide it, or private parties who are willing to donate. Referring to the type of participation categorized by Tosun (1999), the limitations of practitioners in finding solutions to infrastructure and security standards, constrain them to falling to induced participation. According to Tosun (1999:120), its can be solve through such strategies as motivating and training local leaders to assume leadership roles, building self-management and cooperative organizations, and supporting civic and community bodies. However, an efforts are needed to make practitioners willing to provide their funds voluntarily to overcome the infrastructure constraints they face.

CONCLUSION

The Lake Maninjau area has been facing the ecological impact of *karamba* since the last two decades. To overcome this ecological impact, the regional government of Agam District has issued a policy to limiting the number of *karamba*.

As a result, the number of *karamba* has not increased in the last 3 years, but the restriction has implications for the income of *karamba* farmers. To increase economic benefits, *karamba* can be used as tourist attractions, because tourism is widely proven to contribute to the social and economic benefits to local communities and at the same time maintain environmental sustainability. The use of *karamba* as a tourist attraction can be developed by involving *karamba* practitioners as tour operators by relying on drive of river craft activities and feeding fish at the *karamba* in the middle of lake.

The development of tourism activities can be done with the approach of spontaneous participation. However, some infrastructure constraints and safety standards in driving river craft make practitioners fall into iduced participation. *Karamba* tourism can be managed into certain activities in the form of packets, such as fishing, sailing by using the river craft and feeding fish above *karamba*.

Management and development of *karamba* tourism can also be integrated with existing tourism activities in the Lake Maninjau area.

Aknowlegments

This contribution results from research projects with own funds.

REFERENCES

- Andriyani, I., Hardi, E., & Husnita, L. (2012). Socio-economic Change of Local Community After Marine Tourism Development at Sikakap Island, Mentawai District. *Jurnal Ilmu Sosial Mamangan*, 1(2), 95–101.
- Arida, I. N. S., Baiquni, M., Janianton, D., & Ahimsa-putra, H. S. (2014). The Dynamic of *Tri Ning* Ecotourism at Bali: The Problems and Strategic of Developmnet Three Types of Ecotourism at Bali. *Kawistara*, 4(2), 111–127.
- Asnil. (2012). Economic Assessment Analysis and Sustainable Lake Resource Utilization Policy (Case Study of Maninjau Lake, West Sumatra). Institut Pertanian Bogor.

- Björk, P. (2007). Defenition Paradoxes; From Concept to Defenition. In J. Higham (Ed.), *Critical Issues in Ecotourism: Understanding a Complex Tourism Phenomenon* (pp. 23–45). Elsevier Ltd.
- Firdaus, F. (2016). Evaluation of the Social Development Project in the Mbeliling Forest Zone Community Group, District of Manggarai Barat, NTT. *Jurnal Ilmu Sosial Mamangan*, 5(1), 13–22. <https://doi.org/10.22202/mamangan.1926>
- Firdaus, F. (2018). Potency of Integrated Cultural Tourism Development at Maninjau Lake Area, West Sumatera. *Mimbar : Jurnal Sosial Dan Pembangunan*, 34(1), 72–82.
- Firdaus, F., & Tutri, R. (2017). Potential for Ecotourism Development in Nagari Kotobaru, Sub-District of X Koto, Tanah Datar District, West Sumatera. *Jurnal Kawistara*, 7(2), 115–206. <https://doi.org/10.22146/kawistara.13570>.
- Gillham, B. (2005). *Research Interviewing: The Range of Techniques*. New York: Open University Press.
- Hijriati, E., & Mardiana, R. (2014). Community Based Ecotourism Effect on Changing Ecological, Social and Economic Conditions di Batusuhunan Village, Sukabumi. *Solidity: Jurnal Sosiologi Pedesaan*, 02(03), 146–159.
- Hughes, H. L. (2002). Culture and Tourism: A Framework for Further Analysis Culture and Tourism. *Managing Leisure*, 7(3), 164–175. <https://doi.org/10.1080/1360671022000013701>
- Lozano-Oyola, M., Blancas, F. J., González, M., & Caballero, R. (2012). Sustainable Tourism Indicators as Planning Tools in Cultural Destinations. *Ecological Indicators*, 18, 659–675. <https://doi.org/10.1016/j.ecolind.2012.01.014>.
- McKercher, B. (2002). Towards a Classification of cultural tourists. *International Journal of Tourism Research*, 4(1), 29–38. <https://doi.org/10.1002/jtr.346>
- Miles, M. B., & Huberman, A. M. (1992). *Qualitative Data Analysis*. Jakarta.: UI Press.
- Nasution, Z., Sari, Y. D., & Huda, H. M. (2011). Aquaculture on Maninjau Lake: Anticipation of Policies for Handling the Impact of Fish Mass Death. *Jurnal Kebijakan Sosial Ekonomi Kelautan Dan Perikanan*, 1(1), 19–31.
- Pendit, N. S. (2006). *Tourism Science; A Prime Introduction*. Jakarta: Pradnya Paramita.
- Picard, M. (2005). *Bali: Cultural Tourism and Tourism culture*. Jakarta: Gramedia.
- Saifuddin, A. F. (2005). *Contemporary Anthropology: A Critical Introduction to Paradigms*. Jakarta: Kencana.
- Saputra, A. (2015). Opportunities and Challenges of Aquaculture in Maninjau Lake, West Sumatra Province. *Media Akuakultur*, 5(1), 18–21.
- Silverman, D. (2013). *Doing Qualitative Research* (4th Editio). London: Sage Publication Ltd.
- Spillane, J. J. (1987). *Tourism Economics, History and Prospects*. Yogyakarta: Kanisius.
- Sudarmadji, & Darmanto, D. (2014). Environmental Impact and Disaster Risk Tourism Village Development; Case Study in Sambi Tourism Village. *Kawistara*, 4(2), 111–224.
- Suri, H. (2011). Purposeful Sampling in Qualitative Research Synthesis. *Qualitative Research Journal*, 11(2), 63–75. <https://doi.org/10.3316/QRJ1102063>
- Syandri, H., Junaidi, Azrita, & Yunus, T. (2014). State of Aquatic Resources Maninjau Lake West Sumatra Province, Indonesia. *Journal of Ecology and Environmental Sciences*, 5(1), 109–113.
- Tim Konsorsium. (1997). *Study of the Preparation of the National Tourism Development Master Plan, Phase II, 1996/1997: Final Report*.
- Tosun, C. (1999). Towards a Typology of Community Participation in the Tourism Development Process. *Anatolia*, 10(2), 113–134. <https://doi.org/10.1080/13032917.1999.9686975>
- Van Niekerk, M. (2014). Advocating community participation and integrated tourism development planning in local destinations: The case of South Africa. *Journal of Destination Marketing and Management*, 3(2), 82–84. <https://doi.org/10.1016/j.jdmm.2014.02.002>
- Wearing, S., & Neil, J. (2009). *Ecotourism: Impacts, Potentials and Possibilities?* (second). elsevier Ltd.
- Yodi, W. A. (2017). *Cage Fish Cultivation in Nagari Koto Gadang VI Koto, Tanjung Raya District, Agam Regency (2000-2016)*. University Andalas.
- Yoety, O. A. (2006). *Cultural Tourism: Problems and Its Solutions*. Jakarta: PT. Pradnya Paramita.
- Yoety, O. A. (2008a). *Tourism Economy; Introduction, Information and Implementation*. Jakarta: Penerbit Buku Kompas.
- Yoety, O. A. (2008b). *Tourism Planning and Development*. Jakarta: Pradnya Paramita.
- Zhao, W., & Ritchie, J. R. B. (2007). Tourism and Poverty Alleviation: An Integrative Research Framework. *Current Issues in Tourism*, 10(2–3), 119–143. <https://doi.org/10.2167/cit296.0>
- Zolfani, S. H., Sedaghat, M., Maknoon, R., & Zavadskas, E. K. (2015). Sustainable Tourism: A Comprehensive Literature Review on Frameworks and Applications. *Economic Research-Ekonomska Istrazivanja*, 28(1), 1–30. <https://doi.org/10.1080/1331677X.2014.995895>
- *** BPS Agam. (2017). Agam in Figure 2017. Lubuk Basung: BPS Kab. Agam.Ministry of Tourism. (2015). Ministry of Tourism Performance Report 2014. Jakarta.
- *** Tourism, Art & Culture official of Agam. (2003). *Compilation of the Tourism Development Master Plan (RIPP) of Agam District 2002-2012*. Pemda. Kabupaten Agam.
- *** UNEP & UNWTO. (2005). *Making Tourism More Sustainable - A Guide for Policy Makers*.
- *** WTO. (2001). The concept of Sustainable Tourism. Retrieved from <http://www.world-tourism.org/sustainable/concepts.htm>

THE STUDY OF INDOOR MICROCLIMATE ON WOODEN CHURCHES TO BE INCLUDED AMONG ORADEA'S REPRESENTATIVE SIGHTS

Dana Carmen MIHINCĂU (MIHELE)*

University of Oradea, Department of Geography, Tourism and Sports,
1 University Street, 410 087, Oradea, Romania, e-mail: danamihincău@gmail.com

Dorina Camelia ILIES

University of Oradea, Faculty of Geography, Tourism and Sport,
1 University Street, 410 087, Oradea, Romania, e-mail: iliesdorina@yahoo.com

Yulia KOROLEVA

Immanuel Kant Baltic Federal University, Ulitsa Aleksandra Nevskogo, 14,
Kaliningrad, Kaliningradskaya oblast', Rusia, e-mail: yu.koroleff@yandex.ru

Grigore Vasile HERMAN

University of Oradea, Faculty of Geography, Tourism and Sport,
1 University Street, 410 087, Oradea, Romania, e-mail: grigoreherman@yahoo.com

Citation: D.C., Mihincău (Mihele), Ilieș, D. C., Koroleva, Y., & Herman, G. V. (2019). THE STUDY OF INDOOR MICROCLIMATE ON WOODEN CHURCHES TO BE INCLUDED AMONG ORADEA'S REPRESENTATIVE SIGHTS. *GeoJournal of Tourism and Geosites*, 26(3), 737–750. <https://doi.org/10.30892/gtg.26305-393>

Abstract: The current theoretical and experimental study, on microclimate regarding wooden churches currently not listed as historic monuments, but which may in future be included among the top touristic sights of Oradea, aims to highlight the particularities of indoor microclimate in these wooden churches of the city of Oradea and the way that microclimate may be influenced by religious activities, by the number of worshippers, and by that of visitors. For the purposes of this study we used data on temperature, relative humidity and CO₂ using the thermohygrometers KlimaLogg Pro and Trotec BZ30. The three wooden churches of Oradea currently not officially recognized as historic monuments but which, in future, due to their beautiful traditional wood architecture reminiscent of older churches, and to the great number of paintings and religious icons adorning them, may be deemed historic monuments, valorized thought tourism. The analysis of the obtained data reveals that there can be no optimal indoor microclimate inside these churches. DM 10/2001 recommends relative humidity of 45%-60% and temperatures between 6°C and 25°C, ideally of 25°C, so that structural damage should be avoided. On the other hand, thermal comfort for the population attending religious service or merely visiting should consist of temperatures between 17°C and 24°C and humidity of 45%-55%, in accordance to the regulations in force in Romania. In certain areas in the churches

* Corresponding author

conditions do fall within the intervals recommended by the norms in force for health and hygiene and by the standards regarding microclimatic risk factors for wooden constructions. Yet this is only briefly, due to ventilation ensured by the opening of doors and windows, as well as, in one of them, by an air conditioning system.

Key words: air temperature, CO₂, indoor microclimate, Oradea, relative humidity, wooden church, tourism

* * * * *

INTRODUCTION

This study may prove useful for both parishioners, priests carrying out activities in those churches, as well as for tourists visiting Oradea, and particularly its churches, outstanding due to their style and architecture and which, alongside other historically and architecturally important buildings, constitute tourist landmarks. The first significant buildings of the city of Oradea were its places of worship. Recently there have been a fair few churches built in the city. Statistically speaking, there is a place of worship for every 3,000 inhabitants. The first church is built in the Olosig area in 1693.

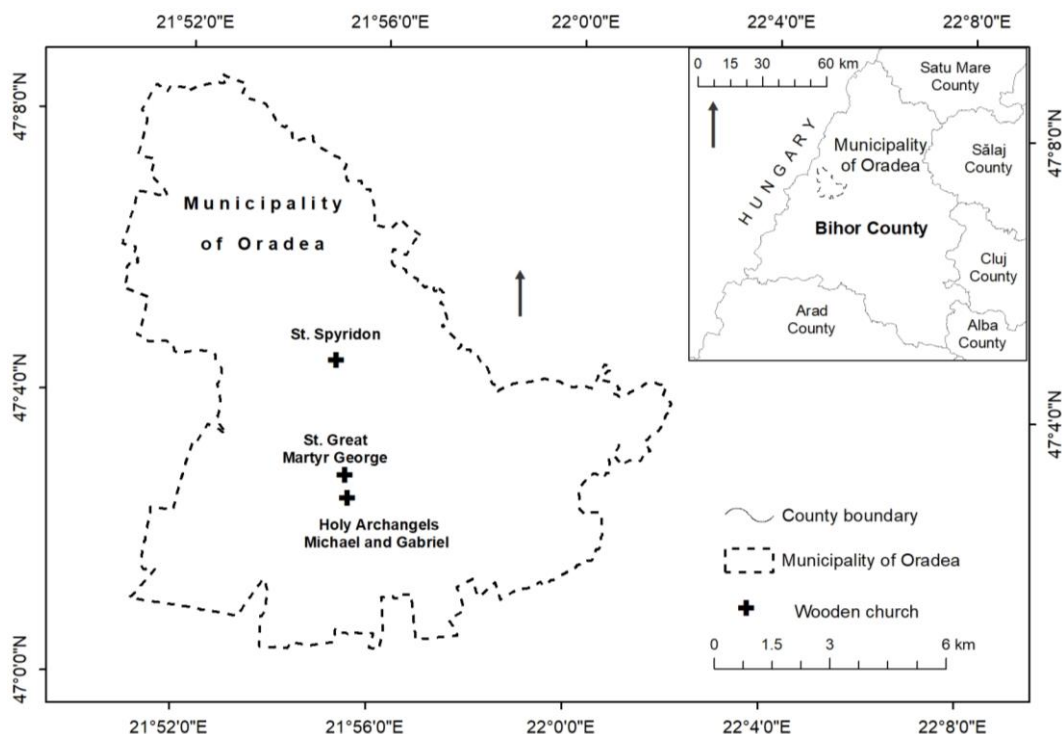


Figure 1. Location of the wooden church in Oradea, Bihor County

It initially belonged to Roman-Catholics and was called St. Brigitta's Church; now it belongs to the Orthodox community, as the Holy Trinity Church. Several other places of worship were erected later, some of which exist to this day, such as the Roman-Catholic St. Ladislaus Church, and the Orthodox churches of the Dormition ("The

Church with the Moon”), and of the Annunciation. At present, Oradea, given its population of approximately 200,000 inhabitants, may be called a genuine “city of churches,” of which there are roughly 60, including prayer houses and synagogues.



Figure 2. St. Great Martyr George wooden church of Oradea, Bihor County, exterior (2019)



Figure 3. St. Great Martyr George wooden church of Oradea, Bihor County, interior (2019)

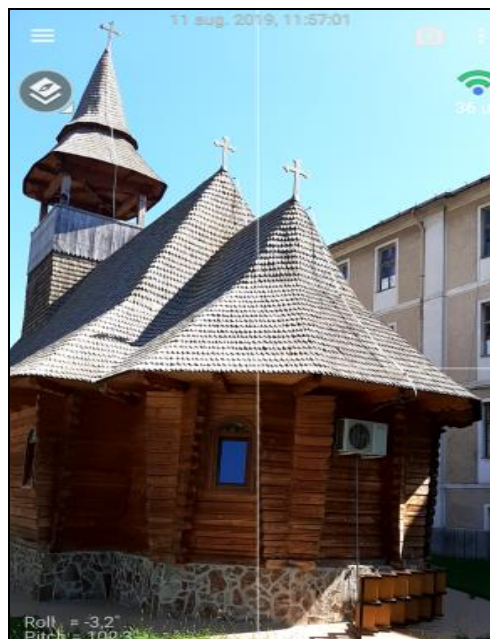


Figure 4. The Holy Archangels Michael and Gabriel Church of Oradea, Bihor County, exterior (2019)



Figure 5. The Holy Archangels Michael and Gabriel Church of Oradea, Bihor County, interior (2019)

This is due to the high number of religions and denominations found in the city: Christianity (Eastern Orthodox; Roman-Catholics; Greek-Catholics; Protestants, such as the Reformed; Neoprottestants, such as the Baptists and the Pentecostals), Judaism (Orthodox

as well as Neolog branches), Islam, etc. Most places of worship, 21, belong to the majoritarian Orthodox denomination; of these, 13 are already built, 7 are undergoing construction, and 1 is in its design phase. The Baptist and Pentecostal Christian denominations have, respectively, 10 and 12 places of worship, though they have fewer parishioners. The Greek-Catholic denomination has 3 churches, and the Jewish denominations have 3 synagogues. Besides the famous large churches, which draw in large numbers of the faithful and an increasing number of tourists on a daily basis, small wooden churches also exist; they are less showy but they are reminders of the traditional wooden architecture of the Romanian people. Oradea has three such wooden churches, built in specific locations and for specific aims, intended to serve a small number of attendants. Such precise aims are as follows: the military church doubly dedicated to the Ascension of the Lord and the Holy Great Martyr George and found in the Oradea garrison was intended for military personnel (Figure 2 and 3); the church dedicated to Archangels Michael and Gabriel, who are also considered patrons of the Romanian Gendarmerie (Figure 4 and 5), was erected in the courtyard of the County Gendarmerie Inspectorate on Universităţii street; while the little church in the courtyard of the Dr. Gavril Curteanu Municipal Clinical Hospital, dedicated to Saint Spyridon (Figure 6 and 7), for the parents whose children are admitted to the hospital for various medical issues. At present, the number of those attending these churches has considerably increased and diversified, as these churches have become open to many other Orthodox in the city who come here for solace and quiet reflection.

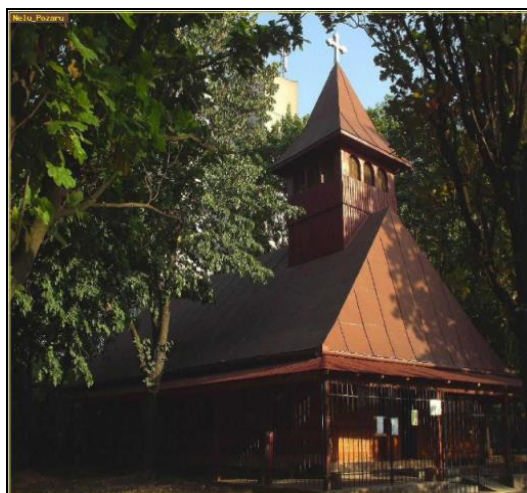


Figure 6. The St. Spyridon Church of Oradea, Bihor County, exterior (2019)



Figure 7. The St. Spyridon Church of Oradea, Bihor County, interior (2019)

MATERIALS AND METHODS

The first stage of this research involved the consulting of articles and papers focusing on the study of indoor microclimate in churches in general, and of wooden churches in particular (Ilieş et al., 2016; 2018a,b; García et al., 2013; Gozner, et al., 2016; Baías et al., 2015; Hudisteanu et al., 2014; Mihăilescu et al., 2002; Necula, 2016; Rosin et al., 2014; Sadłowska et al., 2014; Seppänen et al., 2006; Simileanu et al., 2006; Varas-Muriel et al., 2014; Vasilescu, 2016). Field research has also been carried out to also obtain technical information on churches from the priests serving there, as well as on the number of visitors interested in these specifically Romanian buildings. Data

processing and analysis, the second stage of this research, is based on data yielded by measurements conducted in the interval August 5-15, 2019 in the three wooden churches of Oradea using as measuring devices the Trotec BZ 30 and the KlimaLogg Pro thermohygrometer with 8 external sensors, as well as data on the feasibility of including these three churches on sightseeing tours. Thus we were able to analyze indoor microclimate according to the values of temperature, relative humidity, and CO₂ in all three churches, as well as at various places inside the churches, such as the altar, the nave, the narthex, and the steeple. Added to the values yielded by the measured data were the outdoor weather factors, which play an important part in the daytime analysis of indoor microclimate; the construction factor (building type, size, and material for each church); the human factor, with considerable influence on aspects of the microclimate all during service hours; and the churches' means of heating, ensuring the balance between conservation and thermal comfort (Ilieș et al., 2018c; Indrie et al., 2019).

The data obtained via measurements allow for the identification of optimal conditions in accordance to international and national standards on indoor microclimate (EN-15251:2012, EN-15241:2011, EN-15242:2009 și EN-13779:2008, ASHRAE 62.1-2013), and for the identification of conditions less optimal, thus which do not fall within the standard intervals. Concerning the analysis of those indoor microclimate characteristics, we attest to the obtained values correlating with those established as optimal by standards regarding microclimate factors adopted in Romania, as well as in accordance to the regulations in force and which recommend that temperatures be between 17°C and 24°C, while relative humidity between 45% and 55% to achieve adequate indoor thermal comfort (Law SSM no. 319/2006). Buildings have international recommendations on temperature and relative humidity (UNI 10829: 10-24°C and 55%-65%; and DM 10/2001: 6-25°C, ideal recommendation: 25°C, and 45%-60%), so there are certain measures proposed as necessary for keeping an optimal climate within such wooden churches, for the sake of both the structures themselves and the population visiting them (Mihăilescu et al., 2002).

RESULT DISCUSSION

As the urban architecture of Oradea is highly diverse, with the city permanently evolving, these wooden churches become ever more cramped among the high-rise buildings put up near them. This is indeed the case of the church in the courtyard of the hospital on Corneliu Coposu street, which is very difficult to locate as it is inadequately marked and visually dominated by the multilevel parking complex built in its immediate vicinity. The very access to the church is in fact limited by the wall of the parking complex. Not the same can be said about the wooden church within the Oradea garrison, which enjoys a small but inviting courtyard among the buildings of the former military units, some of which are in a marked state of disrepair. Ventilation is better here due to the air flow unimpeded by the proximity of any nearby high-rises.

The church in the courtyard of the County Gendarmerie Inspectorate on Universității Street also does not have too vast a space to call its own, which is why its construction was atypical for Orthodox churches, so as its placement required special dispensation from the Patriarchy. All Orthodox churches have their altar facing east, yet this one has its altar facing south-west on account of insufficient space, as it is surrounded by gendarmerie buildings. We could also note here that the indoor space is easier to air and ventilate due to the better air flow resulting from the low density of tall buildings in the area (Hudisteanu et al., 2014). As we visited them and participated in the religious services in order to conduct measurements specific to their indoor climate,

we could draw the conclusion that the church in the courtyard of the Gendarmerie is the one least frequented by worshippers and tourists, which is likely due to the more restricted access to the inside of the Gendarmerie's compound, or perhaps also to its location in a non-residential area. The church in the hospital's courtyard is found in a highly populated neighborhood, with many apartment buildings nearby, which renders it crowded during Sunday service and on main religious holidays, especially as it has become a parish church. The military church is also relatively well attended, as it is known by many people since service is held there fairly frequently and regularly, but also because it holds occasional cultural-religious or memorial events.

We monitored their microclimate to make sure that these wooden churches last for centuries and that we gain the ability to control their indoor climate, such that religious service and organized visits for groups or individuals occur under better circumstances and the attending population may benefit from satisfactory climate comfort.

Our monitoring aimed to identify their indoor microclimate characteristics based on values for air temperature, relative humidity, and CO₂ (Onet et al., 2018; García et al., 2013).

To obtain this information, we set up the two measuring devices, the Trotec BZ 30 and the KlimaLogg Pro thermohygrometer with 8 external sensors.

1. The wooden church doubly dedicated to the Ascension of the Lord and the St. Great Martyr George in the Oradea garrison

The „military„ church in the Oradea garrison, under the command of the Bihor County Military Center (Figures 2 and 3), was erected to cater for the spiritual needs of the military personnel and staff and their families, as well as those of all worshippers crossing its doorstep on Sundays and holidays and, more recently, of any occasional visitors to the area on their travels through the city. The church was built in 2001 within the short timespan of three months (Feb. 1-April 23) mainly out of fir wood, with bracing structures out of oak (such as the beams and the support girders on the porch and in the steeple); its foundation is out of concrete and the floorboards are wooden. The roof consists of fir wood shingles; the iconostasis and all the furniture are oaken. It is 23 m long, 5.8 m wide and 23 m tall to the top of the cross; its useful surface is 72 m², with an additional 100 m² for the summer altar, an extension of the porch closed with stained-glass windows. The church also has two bells, one weighing 150 kg and the other, 90 kg, both operated electronically. During winter heating is ensured via the city's gas mainframe, using radiators. Inside, the church is adorned with wood-painted, cloth-painted, and glass-painted religious icons (Figure 2). The measuring devices were in place between August 5, 2019 (7:05 pm) and August 6, 2019 (12:40 pm) and taken away at the end of the Feast of the Transfiguration service, when only around 30 people attended liturgy as it was a work day, during the work week. Information we obtained from the parish priest indicates that on Sundays an average of 80-100 people attend service.

The interpretation of the obtained data shows that the indoor average air temperature was between 24.4°C (in the narthex) and 25.6°C (in the altar). The highest indoor air temperature was 31.2°C, recorded on August 7, 2019 at 6:30 in the church steeple. In contrast, the lowest indoor air temperature was 19.9°C, recorded on August 6, 2019 at 0:00 am (Figure 1). Based on the recorded data, average relative humidity varied between 62% in the narthex and 52% in the altar (Figure 6). The highest value for relative humidity was 66%, recorded on August 6, 2019 at 8 am, while the lowest was 44%, also recorded on August 6, 2019 at 5 pm. Given temperatures of 18-20°C, relative humidity must be 60%, and for temperatures of 24-25°C it should only be at 40% for the experience of thermal comfort. High relative humidity is conducive to the development of microbial flora and damages furniture, particularly the wooden pieces. According to Government

Resolution no. 1546/2003, temperatures inside buildings housing heritage assets must not exceed 22°C, also depending on relative humidity, which should be between 50% and 65%. We can adapt this ruling to wooden churches that happen not to be historic monuments but where we wish to see optimal conditions for the conservation of existent assets (Necula, 2016; Rosin et al., 2014). The analysis of the yielded results clearly shows that the church does not fulfill the basic necessary conditions to ensure an optimal microclimate for the population or the wooden church itself (Sadłowska et al., 2014).

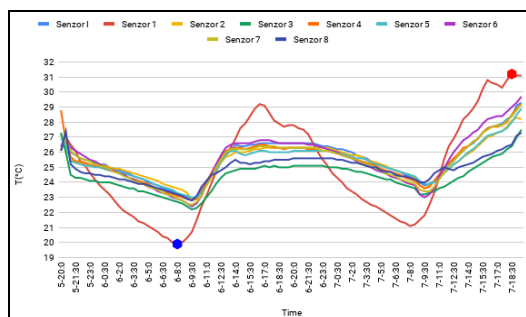


Figure 8. Temperature values recorded in the interval August 5-7, 2019 in the St. George church of Oradea

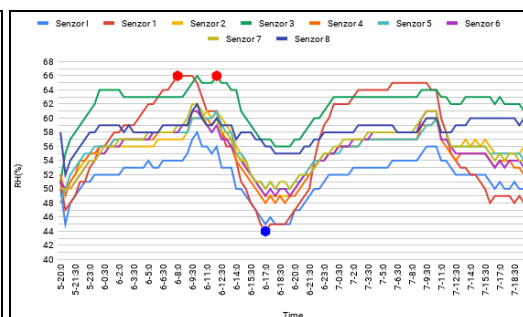


Figure 9. Relative humidity values recorded in the interval August 5-7, 2019 in the St. George church of Oradea

During the August 6 service, the data recorded between 9 am and 12:50 pm (Figure 10) show that temperatures vary from 23.7°C at 9 a.m. to 28°C at 12:40 p.m., which are values over the normal indoor air temperature limits, in accordance to the regulations in force in Romania recommending temperatures between 17°C and 24°C to achieve adequate indoor thermal comfort. Relative humidity values registered a downward trend as the air warmed up, with variations between 55% at 9 a.m. and 46% at 12:50 p.m. Given that optimal indoor comfort requires humidity values to fall between 45% and 55%, we see that optimal conditions are met here. On August 6, 2019 (Figure 11), CO₂ values varied from 381 ppm, the minimum value recorded at 9:05 a.m., to 652 ppm, the maximum value recorded at 10:50 a.m. The recorded values are optimal according to the health and hygiene norms in force (Hurezeanu, 2008).

2. The wooden church in the courtyard of the County Gendarmerie Inspectorate

The information provided by the church's priest reveals that construction began on March 19 and ended on November 2. Its placement is different to that of the other Orthodox churches, and it is built out of spruce, with a concrete foundation and floors out of wood-imitation sandstone. The roof consists of spruce shingles, the iconostasis and the furniture are made of oak, and its seats made of beech. The inner walls are decorated with frescoes painted using natural dyes on a foundation of lime and tow, overlaid directly on the wood with a supporting wire mesh (Figures 4 and 5). The church has an electronic sound system instead of bells, a choice selected in order to avoid trepidations that would risk deteriorating the painting. It is 17 m long, 7 m wide, and 19 m tall to the tip of the cross on the steeple. Its surface is 118 m². This church has two doors, one in the narthex, at the back of the church, and the other in the nave, on its right. Services held on Sundays and religious festivals throughout the year gather approximately 30-50 people on average.

The measuring devices were in place between August 8, 2019 (8:20 am) and August 11, 2019 (11:50 am), till the end of Sunday Mass, which was attended by some 20 people.

The interpretation of the yielded data shows, as seen on Figure 11, that the average indoor air temperature ranged between 24.4°C (recorded in the narthex) and 25.6°C (in the steeple). The highest indoor temperature was 27.8°C, recorded on August 11, 2019 at 1 pm inside the nave, where the majority of worshippers were found. In contrast, the lowest air temperature value was 21.9°C, also recorded on August 11, 2019 at 10:30 am (Figure 9), inside the altar due to the air conditioning system having been turned on.

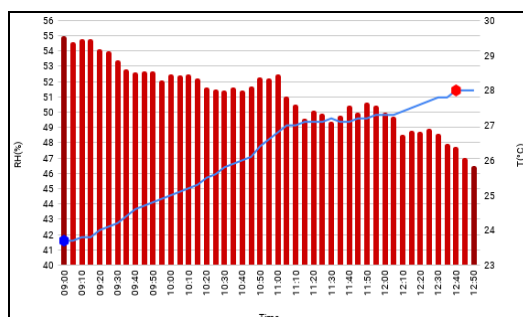


Figure 10. Temperature and relative humidity variations recorded on August 6, 2019 in the St. George church of Oradea

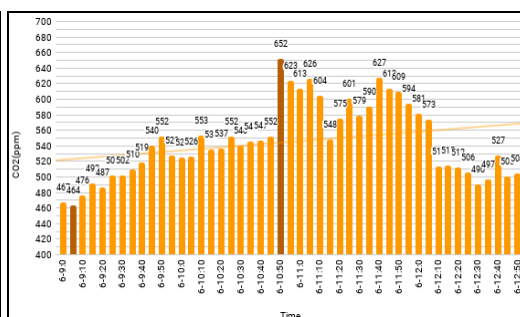


Figure 11. CO₂ variations recorded on August 6, 2019 in the St. George church of Oradea

As seen on Figure 13, the analyzed data shows that average relative humidity fell between 68% in the narthex and 54% in the altar. The highest relative humidity value was 72%, noted on August 8, 2019 at 2:30 pm, while the lowest was 54%, spotted on August 11, 2019 at 1 pm. The church registered values slightly over the normal limits of temperature and relative humidity, in accordance to ISO 16814:2008, ISO 7730: 2006, SR EN 12792:2004, and the regulations in force in Romania, Law no. 263 of July 19, 2007 prescribing relative humidities between 55% and 65% and temperatures between 10°C and 24°C in order to ensure adequate indoor thermal comfort *** (2007).

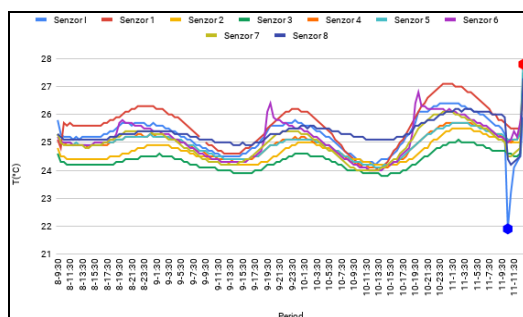


Figure 12. Temperature values recorded in the interval August 8-11, 2019 in the St. Michael and Gabriel church of Oradea

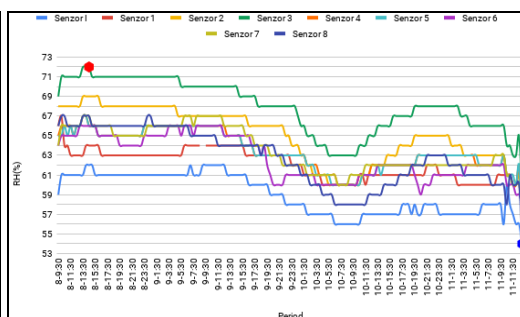
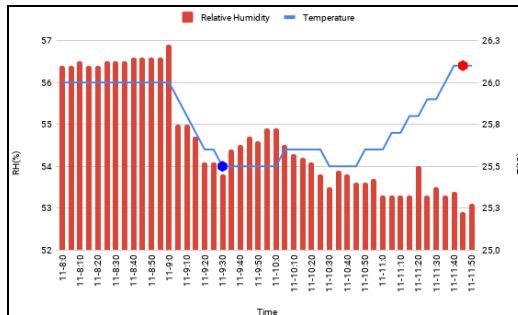


Figure 13. Relative humidity values recorded in the interval August 8-11, 2019 in the St. Michael and Gabriel church of Oradea

During the August 11 service, based on the data recorded between 8 a.m. and 11:50 a.m., it became apparent that, as seen on Figure 14, temperature values range between 25.5°C at 9:30 am and 26.1°C at 11:45 am. Such values are slightly over the normal limits for indoor air temperature, in accordance to regulations in force in Romania prescribing temperatures between 17°C and 24°C for adequate indoor thermal comfort. Relative

humidity values registered a downward trend, as seen on Figure 15: as the air warmed up, they decreased from 57% at 9 am to 53% at 11:45 am. Given that, for optimal indoor comfort levels the humidity must be between 45% and 55%, we may conclude that at this location the optimal conditions are met, with a maximum slightly in excess but still fitting the 50%-65% interval required for wooden buildings. On August 11, 2019 the CO₂ values varied from 467 ppm, the minimum recorded at 8:55:40 a.m. and at 9:00:40 a.m., to 824 ppm, the maximum recorded at 11:30 a.m. These recorded values are optimal, in accordance to the health and hygiene norms in force (Hurezeanu, 2008).



accordance to the regulations in force in Romania, namely the Law no. 319/2006 recommending between 17°C and 24°C for adequate indoor thermal comfort. For optimal comfort levels inside the church, indoor humidity should be between 45% and 55%, while here it exceeds those values, therefore failing to comply with the interval recommended by legislation in force, EN-15251:2012, ISO 16814:2008, and ISO 7730:2006.

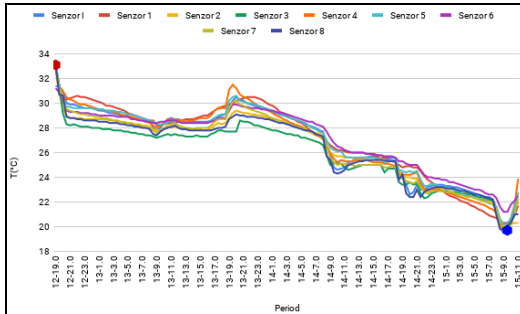


Figure 16. Temperature values recorded in the interval August 12-15, 2019 in the St. Spyridon church of Oradea

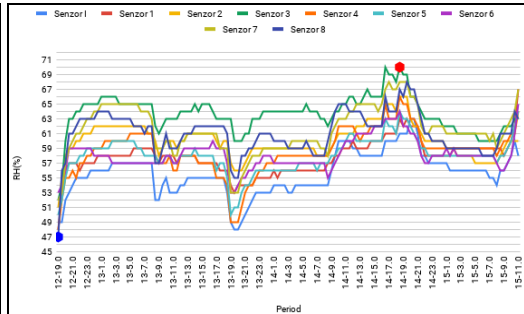


Figure 17. Relative humidity values recorded in the interval August 12-15, 2019 in the St. Spyridon church of Oradea

On August 12, 2019 (during vesper in the Assumption Fast), based on the measurements taken between 5:55 p.m. and 8:23 p.m. (Figure 18), it was visible that temperature values decreased from the maximum of 33.4°C at 6 pm to 30.3°C at 8:33 p.m. These values far exceed the normal limits for indoor air temperature, as per ASHRAE 62.1-2013, ASHRAE 55: 2004, EN-15251:2012, ISO 16814:2008, ISO 7730:2006, which recommend an interval from 17°C to 24°C for the attainment of adequate indoor thermal comfort. Relative humidity values (Figure 19) registered an upward trend as the air cooled, such that they varied from 43% at 5:55 p.m. to 53% at 8:23 p.m. Given that humidity must be between 45% and 55% for optimal indoor comfort levels, we may conclude that the optimal conditions are met here, with an insignificant decrease relative to the minimum point.

On August 12, 2019 CO₂ values vary from 475 ppm, the minimum reached at 5:55 pm, to 820 ppm, the maximum reached at 6:53 p.m. Thus the recorded values are optimal, in accordance to the health and hygiene norms in force, EN-15251:2012, EN-15241:2011, EN-15242:2009, EN-13779:2008, and ASHRAE 62.1-2013.

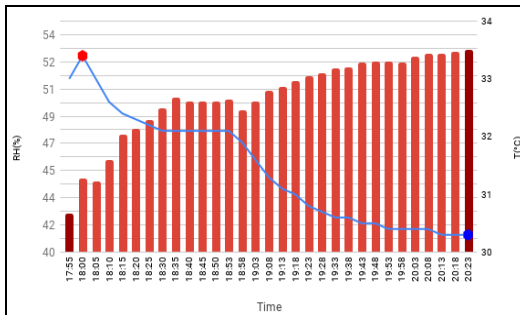


Figure 18. Temperature and relative humidity variations on August 12, 2019 in the St. Spyridon wooden church of Oradea

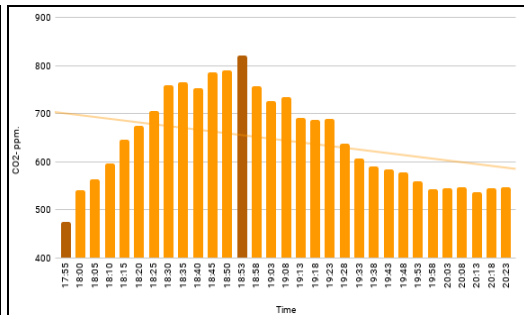


Figure 19. CO₂ variations on August 12, 2019 in the St. Spyridon wooden church of Oradea

Interpretation of the data in a comparative view of all three churches

The minimum values recorded in the three monitored churches fall inside the optimal interval (17°C-24°C) recommended by EN-15251:2012, EN-15241:2011, EN-15242:2009, EN-13779:2008, and ASHRAE 62.1-2013 for adequate indoor thermal comfort.

The lowest minima for air temperature in the three churches (Figure 20) are very close together, ranging from 19.5°C in the narthex of the St. Spyridon church to 19.9°C in the steeple of the St. George church and to 21.9°C in the altar of the St. Michael and Gabriel church. The highest minima also vary in the same church order, namely 21.2°C at the lectern of the St. Spyridon church, 22.9°C in the altar of the St. George church, and 24.2°C in the narthex of the St. Michael and Gabriel church.

Thus there are minor differences only in the case of the respective church areas. The lowest minima for relative humidity in the three churches (Figure 21) are very close together just as the case of temperatures has been. 44% in the steeple of the St. George church, 47% in the altar of the St. Spyridon church, and 54% in the altar of the St. Michael and Gabriel church all fall inside the interval recommended as optimal according to EN-15251:2012, EN-15241:2011, EN-15242:2009, EN-13779:2008, and ASHRAE 62.1-2013. The highest measured minima are 52% in the altar of the St. George church, 53% in the nave-lectern area of the St. Spyridon church, and 59% in the narthex of the St. Michael and Gabriel church. It is thus clear that these values fit in the interval considered as ensuring an optimal indoor comfort level for service participants, of 45%-55%, as well as in the interval of 50%-65%, optimal for wooden structures in accordance to EN-15251:2012, EN-15241:2011, EN-15242:2009, EN-13779:2008, ASHRAE 62.1-2013, and DM 10/2001.

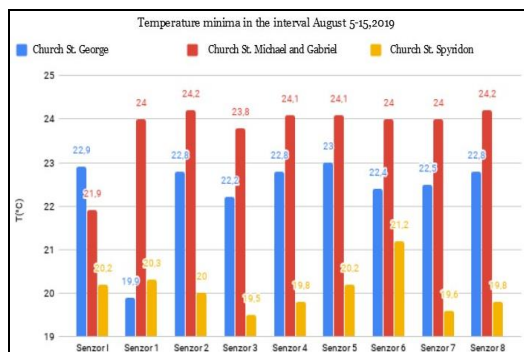


Figure 20. Temperature minima in the interval August 5-15, 2019 in the St. George, St. Michael and Gabriel, and St. Spyridon wooden churches of Oradea

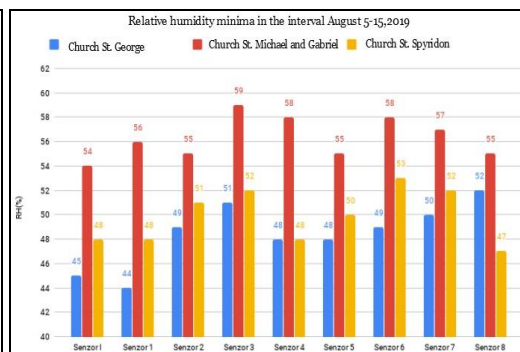


Figure 21. Relative humidity minima in the interval August 5-15, 2019 in the St. George, St. Michael and Gabriel, and St. Spyridon wooden churches of Oradea

The average values recorded in the three monitored churches fall slightly outside the optimal recommended interval of 17°C to 24°C for adequate indoor thermal comfort, in accordance to regulations in force in Romania. Average values for air temperature in the three churches (Figure 22) are very close together, ranging from 24.4°C in the narthex of the St. George church and St. Michael and Gabriel churches, to 25.6°C in both the altar of the St. George church and the steeple of the St. Michael and Gabriel church, to 25.9°C in the narthex and respectively 27.1°C in the nave-lectern area of the St. Spyridon church. Thus there are minor differences only in the case of the respective church areas.

Average values for relative humidity in the three churches (Figure 23) are very close together just as the case of temperatures has been. The lowest are in the altars: 52% in

the St. George church, 56% in the St. Spyridon church, and 59% in the St. Michael and Gabriel church. The highest average values measured are also in the altars: 62% in the St. George church, 64% in the St. Spyridon church, and 68% in the St. Michael and Gabriel church.

We may thus make the observation that differences are not recorded among church areas but only among churches depending on external weather factors. The recorded values exceed the values of the standards recommended for indoor humidity, 45%-55%, considered to ensure optimal indoor comfort, therefore the heat sensation will be intensified.

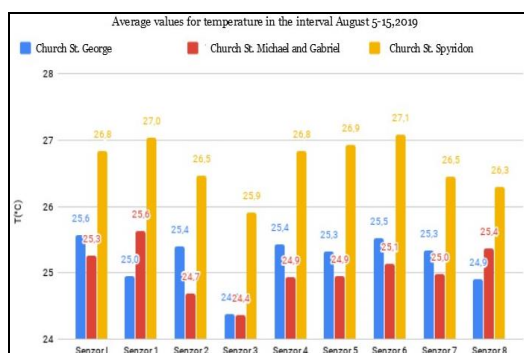


Figure 22. Average values for temperature in the interval August 5-15, 2019 in the St. George, St. Michael and Gabriel, and St. Spyridon churches of Oradea

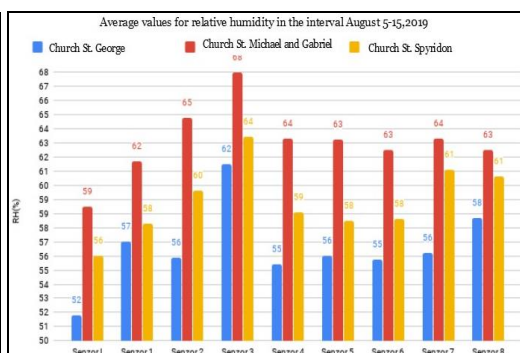


Figure 23. Average values for relative humidity in the interval August 5-15, 2019 in the St. George, St. Michael and Gabriel, and St. Spyridon churches of Oradea

The maximum values recorded in the three monitored churches fall outside the optimal interval recommended by UNI 10829 as between 10°C and 24°C (for the conservation of wooden structures) and by EN-15251:2012, EN-15241:2011, EN-15242:2009, EN-13779:2008, and ASHRAE 62.1-2013 (for adequate indoor thermal comfort).

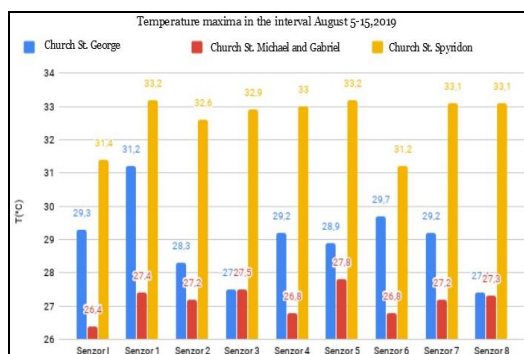


Figure 24. Temperature maxima in the interval August 5-15, 2019, in the St. George, St. Michael and Gabriel, and St. Spyridon wooden churches of Oradea

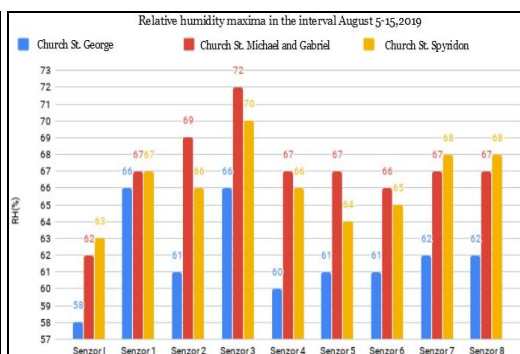


Figure 25. Relative humidity maxima in the interval August 5-15, 2019 in the St. George, St. Michael and Gabriel, and St. Spyridon wooden churches of Oradea

These obtained values ranged between 26.4°C and 33.2°C, thus greatly exceeding the recommended intervals. The maximum values for air temperature in the three churches (Figure 24) differ significantly, as they vary from 26.4°C in the altar (high up) and 27.5°C in the narthex (in the St. Michael and Gabriel church) to 27.4°C in the altar (floor level) and

31.2°C in the steeple (in the St. George church) and to 31.2°C in the nave by the lectern and 33.2°C also in the nave but on the left, by the relics (in the St. Spyridon church). Thus we may notice that there are minor differences among churches also regarding church areas. The maximum values for relative humidity in the three churches (Figure 25) range between 58% and 72%, much over the recommended interval of 45%-60%, considered optimal for the preservation of wooden structures and for indoor comfort, as per DM 10/2001, EN-15251:2012, EN-15241:2011, EN-15242:2009, EN-13779:2008, and ASHRAE 62.1-2013. These values enhance the heat sensation inside the church and prove conducive to the development of mold even at high temperatures.

The lowest values are found in the altars: 58% in the St. George church, 62% in the St. Michael and Gabriel church, and 59% in the St. Spyridon church; while the highest values are in the narthexes: 66% in the St. George church, 70% in the St. Michael and Gabriel church, and 72% in the St. Spyridon church.

CONCLUSION

Air quality is an invisible trait, yet it has a fairly high number of ill effects on human health as well as on the structural integrity of wooden churches, provided that wood is sensitive to temperature oscillations and easily affected by microorganisms developing under conditions of high humidity. As such, it is important to maintain its quality within optimal parameters, a sure means of preventing numerous issues for both humans and the wood itself. To keep air quality within optimal intervals, we recommend centralized heating systems during winter and centralized ventilation systems during summer.

Thus we may avoid the situations uncovered by our research in these churches, namely the fact that, because of only using local fans, which cool the environment only in a small perimeter around their location (in the altar and in the nave by the lectern), there are significant differences between the spaces in use within the churches. CO₂ values recorded in the three churches during religious service fall within the optimal parameters prescribed by the health and hygiene norms in force. There were no side effects to be noted since there was natural ventilation ensured during service by means of open windows and doors. Aeration is an active factor which prevents air masses stagnation and the appearance of an aggressive destructive environment in buildings. So, aeration should be inextricably linked with the design concept of the wooden church, with its composition, with the profile of the internal space and functional zoning.

Evidence of this link will allow us to reveal the preservation methods of the wooden religious buildings which were used by ancient architects, and apply them to modern works on the restoration, conservation and reconstruction of these cultural and historical monuments (Buturlintsev, 1988; Kochev, 2017). Judging by the aforementioned results and discussion, we may conclude that microclimate conditions that are optimal for the performing of religious service and tourism in the monitored interval are not met everywhere within the churches. However, we cannot refer to inadequate conditions either, as any excesses are brief and easy to control, especially should systems to monitor air quality be set up so the situation is always clear. Showcasing the wooden churches and adding them to the sightseeing tours of Oradea and Bihor County alongside the already established older wooden churches that are acknowledged as historic monuments (so tourists may compare and contrast their architectural features) should be accomplished with the support of local authorities and EU funding.

Acknowledgements

The research was possible by equal scientific involvement of all authors and acknowledge the support of the Grant PN-III-P1-1.2-PCCDI-2017-0686.

REFERENCES

- Baias, Ș., Gozner, M., Herman, G.V., Măduța, F.M. (2015), Typology of wooden churches in the drainage basins of Mureș and Arieș, Alba County în *Analele Universității din Oradea, Seria Geografie*, Tom XXV, Nr. 2/2015 (December), Editura Universității din Oradea;
- Buturlintsev, V. B., (1988), *The influence and role of aeration in the Russian folk wooden cult architecture of the 17th-18th centuries: The Transfiguration Church in Kizhi as an example: PH.D. dissertation: 18.00.01 – Moscow*, 1988, 155 p.
- García-Diego, F. J., Fernández-Navajas, Á., Beltrán, P., & Merello, P., (2013), *Study of the effect of the strategy of heating on the mudejar church of Santa Maria in Ateca (Spain) for preventive conservation of the altarpiece surroundings*. *Sensors*, 13(9), 11407-11423.
- Gozner, M., Josan I., Baias, Ș., Măduța, F.M. (2016), The Religious Attractions – An Expression of Authenticity in the Territorial System Albac - Arieșeni and Alba County (Romania), in *GeoJournal of Tourism and Geosites Year IX, Volume 1, Oradea-Gdansk, Romania-Poland*, Editura Universității din Oradea.
- Hudisteanu, V. S., Baran, A. I., Balan, M., Chereches, N. C., Mateescu, T., Verdes, M., Ciocan, V., (2014), *Improvement of the indoor climate conditions inside orthodox churches*. International Scientific Conference CIBV, 2014, 7-8 November 2014, Brașov.
- Ilies, A., Wendt, J. A., Ilieș, D. C., Ilieș, M. & Deac, A., L. 2016, The patrimony of wooden churches, built between 1531 and 2015, in the Land of Maramureș, Romania, *Journal of Maps*, Vol. 12, pp 597-602.
- Ilies, D. C., Onet, A., Wendt, J. A., Ilieș, M., Timar, A., Ilies, A., Baias, S. & Herman, G. V., (2018a). *Study on microbial and fungal contamination of air and wooden surfaces inside of a historical Church from Romania*. *Journal of Environmental Biology*, 39(6), 980-984.
- Ilieș, D. C., Buhaș, S., Ilieș, A., Gaceu, O. R., Onet, A., Buhaș, S., Rahotă, D., Dragoș, P., Baias, Ș., Marcu, F., Onet, C., (2018b), *Indoor Air Quality Issues. Case Study: The Multipurpose Sports Hall Of The University Of Oradea*. *Environmental Engineering and Management Journal*, 17(11), 2999-3005.
- Ilieș, D. C., Onet A., Marcu F. M., Gaceu O. R., Timar A., Baias Ș., Ilieș A., Herman G. V., Costea M., Tepelea M., Josan I., Wendt J., (2018c), *Investigations Regarding The Air Quality In The Historic Wooden Church In Oradea City, Romania*. *Environmental Engineering and Management Journal*, 17(11), 2731-2739.
- Indrie, L., Oana, D., Ilieș, M., Ilieș, D. C., Lincu, A., Ilieș, A., Ș. Baias, G. Herman, A Onet, M. Costea, F. Marcu, L. Burta & Oana I., (2019), *Indoor air quality of museums and conservation of textiles art works. Case study: Salacea Museum House, Romania*. *Industria Textila*, 70(1), 88-93.
- Kochev, A. G., (2017), *The influence of external aerodynamics on the microclimate of Orthodox churches: research monograph*; Nizhny Novgorod: Novgorod State University of Architecture and Civil Engineering, 188 p., ISBN 978-5-528-00192-0.
- Mihăilescu, M., Constantinescu, C., Camui, I., (2002), *Influența unor factori de mediu asupra monumentelor istorice (The influence of environmental factors upon the historic monuments)*. In 8th International Conference Târgu Jiu.
- Necula, E. T., (2016), *Teza de doctorat, Biserici de lemn buzoiene, stare de conservare și programe de valorificare, Târgoviște (Wooden churches from Buzau, conservation and valorization. Ph.D. thesis)*, <http://scoaladoctorala.valahia.ro>, 14.12.2017, 19:10.
- Onet, A., Ilies, D. C., Buhas, S., Rahota, D., Ilies, A., Baias, S., Marcu F. & Herman, G. V., (2018), *Microbial Air Contamination in Indoor Environment of University Sports Hall*. *Journal of Environmental Protection and Ecology*, 19(2), 694-703.
- Rosin, P., Adamatzky, A., Sun, X. (Eds.), (2014), *Cellular automata in image processing and geometry*. Springer International Publishing.
- Sadłowska-Sałęga, A., & Radoń, J., (2014), *Experimental and theoretical study of microclimate in historical church in Wiśniowa*. *Czasopismo Techniczne*, 3-B(8), 415-423.
- Seppänen, O., Fisk, W.J., Lei, Q.H., (2006), *Ventilation and performance in office work*. *Indoor Air*, 16, 28-36.
- Simileanu, M., Maracineanu, W., Deciu, C., Striber, J., & Radvan, R., (2006), *A complex portable optoelectronic setup for on-site interventions: case studies*. In *Seventh International Conference on Vibration Measurements by Laser Techniques: Advances and Applications* (Vol. 6345, p. 63450U). International Society for Optics and Photonics.
- Varas-Muriel, M. J., Fort, R., Martínez-Garrido, M. I., Zornoza-Indart, A., López-Arce, P., (2014), *Fluctuations in the indoor environment in Spanish rural churches and their effects on heritage conservation: Hygro-thermal and CO₂ conditions monitoring*. *Building and Environment*, 82, 97-109.
- Vasilescu, K., (2016), *Documentar Biserici de lemn din Romania (Wooden churches from Romania)*, DVD, Studio East Movies.

Submitted:
17.08.2019

Revised:
04.09.2019

Accepted and published online
06.09.2019

SLOW FOOD AND TOURISM DEVELOPMENT: A CASE STUDY OF SLOW FOOD TOURISM IN UTTARAKHAND, INDIA

Munish AHLAWAT*

Amity School of Hospitality, Amity University Uttar
Pradesh, Noida, India, e-mail: ahlawat22@gmail.com

Piyush SHARMA

Amity Institute of Travel and Tourism, Amity University
Uttar Pradesh, Noida, India, e-mail: psharma3@amity.edu

Prashant Kumar GAUTAM

University Institute of Hotel and Tourism Management, Panjab
University, Chandigarh, India, e-mail: prashant.k.gautam@gmail.com

Citation: Ahlawat, M., Sharma, P., & Gautam, P.K. (2019). SLOW FOOD AND TOURISM DEVELOPMENT: A CASE STUDY OF SLOW FOOD TOURISM IN UTTARAKHAND, INDIA. GeoJournal of Tourism and Geosites, 26(3), 751–760. <https://doi.org/10.30892/gtg.26306-394>

Abstract: Slow food has emerged as an unexplored contributor to promotion of local tourism. The objective of the present study is three-fold; to identify the various slow food being served in Uttarakhand, to recognize scope of development of slow food tourism by perception of major stakeholders, and to discuss recent developments that have enabled its growth in the state. The study employs unstructured, multi-stakeholder interview method across 5 tourist destinations among 680 respondents- including tourists, travel agents and guides, hotel and restaurant managers, and local population. The results of the study find a rich diversity of slow food cuisine, and identify five key factors in the development of slow food tourism in Uttarakhand, namely; Government support and financial aid, improved infrastructure, inter-industry cooperation, local and public awareness, and marketing. Several recent government policies and initiatives have been discussed in light of their positive impact on developing slow food tourism.

Key words: Slow food, slow food tourism, slow food development, local food, gastronomy tourism, Uttarakhand, India

* * * * *

INTRODUCTION

Over the past few years, tourism has experienced continued growth and deepening diversification to become one of the fastest growing economic sectors in the

* Corresponding author

world. It has become a major player in the world trade, since according to the Travel and Tourism Global Economic Impact (2018) report travel and tourism directly contributed USD 8.3 trillion to global economy and supported 313 million jobs. According to the United Nations World Tourism Organization (2018), international tourism receipts have grown above USD 1.33 trillion in the year 2018, at a 3 percent growth rate from the previous year. The top three countries in the world on the basis of international tourism receipts in 2018 are namely; USA (USD 210.7 billion), Spain (USD 68 billion) and France (USD 60.7 billion). India stands seventh among 184 countries in terms of contribution of travel and tourism sector to GDP. Tourism in India is important for the country's economy and it is growing rapidly. Over 10 million foreign tourists arrived in India in 2017, compared to 8.89 million in 2016, representing a growth of 15.6%. In January-October 2018, tourist arrivals through e-visa in India increased at 44.8 per cent year-on-year to 1.80 million. This sector is predicted to grow at an annual rate of 6.9% to 32.05 lakh crore (US\$450 billion) by 2028 (9.9% of GDP).

India's foreign exchange earnings (FEEs) from tourism sector increased by 8.3 percent to US\$ 23.54 billion in January-October 2018. India enjoys great advantages in tourism scenario- unparalleled natural beauty, rich history and a treasure trove of cultural diversity. Modern tourists are looking to expand their worldview beyond sightseeing by indulging in travel experiences that cater to their individual interests and delights. The popular acceptance of culture- oriented travel experience has opened rich avenues for specific branches of tourism. Culinary tourism is a part of immersion tourism. Immersion tourism refers to the travel to a particular place with a purpose of experiencing its history, culture, people and cuisines. The Global Report on Food Tourism, published by United Nations World Tourism Organization, suggests that one third of the holiday budget of an average tourist is spent on food.

It is therefore indisputable that food forms a key portion of the travel experience at any tourist destination. Popularizing slow food, or local and regional culinary habits, can generate deeper interest and excitement in visiting a particular tourist spot, which can act as a catalyst for local tourism. Slow food tourism is inspired from the Slow Food Movement, which began as an effort to promote regional ways to establish cultural identity by recognizing the important role of food habits in a community and heritage (Kivela & Crofts, 2005). Slow food tourism focuses on culinary consumption to be a wholesome travel experience in itself that involves rest, escapism, learning, thrill, status and lifestyle (Santich, 2004). Slow food tourism also benefits from other attributes like originality, variety and authenticity (Tellstrom et al., 2006). These factors play a huge role in building the attractiveness of a potential tourist destination.

Tourism based on culinary temptations and delights has been experimented to great results in several countries around the world. Special events like food festivals and fairs are conducted to harness nostalgia and cultural diversity and reap the vast economic profits of slow food tourism (Upadhyay & Sharma, 2014). Further, the environmental and social benefits of valuing locally-grown and traditionally cooked meals over mass-produced fast food are added incentives for promoting slow food tourism. The influx of tourists and economic prosperity leads to better infrastructure and investments, which begins a cycle of growth and development. Thus, slow food can play a very significant role in promotion of a tourist destination.

There is a growing interest in identifying the scope of slow food in developing a tourist destination to realize its complete potential. There is a need of relevant research into the importance of slow food tourism in the context of locations with developing tourism industries like India. Each of the 29 states of India has its own distinct identity, terrain, communities, languages and dialects and an amazing and unique food history

and heritage. The present study offers an insight into the potential of slow food tourism development in the small state of Uttarakhand, India. Uttarakhand, located in North India, has a population of above 1 crore (Census, 2011), a predominantly hilly terrain. Uttarakhand is divided into major divisions, namely, Garhwal and Kumaon. The state is also known by the name- *Devbhumi*, meaning, 'Land of the Gods', which is a nod to the myriad holy sites scattered in its territory. Its tourism industry is currently based on exploration of scenic landscapes, environmental preserves and religious pilgrimages. The state saw a tourist inflow of above 34.7 million tourists in a year (2017), with popular destinations being the cities of Haridwar, Dehradun, Mussoorie and Rudrapur. This implies that Uttarakhand has the requisite infrastructure and support for a flourishing tourism market, and can develop further by adopting slow food tourism in its folds. This scenario makes Uttarakhand an interesting area of research for the development of slow food tourism. The state of Uttarakhand is a food enthusiast's dream come true with its incredible collection of delectable food items. Being located on the hills, the ingredients involved in making traditional food are free of any sort of adulteration, ensuring high nutrition and health benefits.

For achieving the objectives of this study, researchers have firstly provided a review of relevant literature on slow food movement, slow food tourism and its importance. Researchers have then gathered primary data from various stakeholders across five popular tourist destinations of the state regarding the scope of slow food tourism in Uttarakhand. Based on content analysis of the responses collected, researchers have discussed the factors that have contributed to the role of slow food in tourism industry. Finally, researchers have supported their findings with secondary data and discussed ground developments that have occurred in the political and social scenario, in terms of realization of slow food tourism.

The study concludes with an overall summary of key points in this paper, and also presents recommendations for tourism industry and the government. Lastly, the practical implications and limitations of this study have been discussed.

REVIEW OF LITERATURE

The present paper is an examination of scope of slow food and development of slow food tourism in Uttarakhand. The following review of literature examines relevant studies about food, its role in tourism industry, the creation of food-specific tourism, the overall relevance of such tourism, and finally, the factors that have contributed to its development. Food is an integral element to a tourist destination and can have substantial role to play in building the popularity of a destination (Banerjee et al., 2015). The cause behind such impact of food in a travel experience is the association of food with memory and emotions of nostalgia. Hashimoto and Telfer (2006) have highlighted that the concept of 'culinary tourism' was developed in the late 1990s, which succeeded in labelling the specific brand of tourism which catered to tourists expressing local and regional food culture as an important dynamic in travel. Everett and Atchison's (2008) study pointed out the important role of food in experiencing the full picture of Cornish culture and heritage. Similarly, Baltescu (2016) revealed that culinary experiences heavily influenced tourists' perspectives towards different destinations in Romania.

The idea behind slow food tourism is to inspire tourists to indulge in the rich diversity of locally- grown food (Miele & Murdoch, 2002). The larger motive of slow food tourism is the endeavor to promote social connection and environmental conservation and sustainability (Quan & Wang, 2004). As per Sidali et al., (2015), slow food tourism brings sustainability practices and financial independence to local entrepreneurs and social community. It also maximizes the tourist satisfaction and influences tourist behavior

(Karim et al., 2009). Studies identify various components as major factors of healthy slow food tourism- local restaurants or hotels, food events, food festivals and variety of foods (Rand et al., 2003). Atton (2003) argues that the social awareness factors that could lead to success of slow food development are traditional culture, biodiversity and social justice. The method and style of serving food adds another layer of cultural diversity and uniqueness to the experience (Jiménez Beltrán et al., 2016), which makes the hospitality sector play an important role in its development. It is then imperative that tourist organizations therefore not fail to capitalize on slow food's scope and potential and demand to promote the development of slow food tourism.

RESEARCH GAPS

Despite being in good rankings globally and hosting a vast length and breadth of multiple cuisines within the country, India has not seen many studies on slow food tourism development in its states. While present literature on slow food shows a general understanding and assessment of slow food movements across the globe, there is a gap in state-specific studies on slow food tourism development in India. There has also been a considerable lack of studies that involve the perspectives of various stakeholders in the tourism sector namely; local people, tourist guides and agencies, hospitality sector service providers, and the tourists themselves. The present study will bridge these gaps in literature by identifying the scope of slow food tourism in Uttarakhand. Further, using data collected from various stakeholders, the key factors involved in development of slow food tourism in Uttarakhand shall be identified and discussed. Lastly, the study will also highlight the key developments that have taken place in the field.

Objectives:

1. To identify the various slow food being served in Uttarakhand.
2. To identify the scope of the slow food tourism in Uttarakhand.
3. To identify the recent developments in the Uttarakhand regarding slow food tourism.

RESEARCH METHODOLOGY

Current study is principally based on the primary data collected from various stakeholders in the state of Uttarakhand. Researchers have opted for unstructured, open-ended interview method since there was a lack of relevant and specific studies on slow food tourism development in Uttarakhand, and to understand the full scope of development of slow food tourism. Respondents selected for the survey were selected through snowball method of data collection; researchers have approached 56 employees and managers in 25 popular hotels across Uttarakhand for collecting primary data about the scope and factors of slow food in the state. These hotels were based in the top five districts of Uttarakhand, according to the number of tourist arrivals in 2018. Based on the responses and recommendations of these hoteliers and employees, researchers have further expanded the pool of respondents to include 70 restaurant managers, 32 tour guides and 37 travel agents. To fully understand the vast opportunities of development of slow food tourism in Uttarakhand, researchers have also included data collected from a random sample of 156 tourists visiting Uttarakhand as well as 329 local people. Thus, the total number of respondents in the study adds up to 680, providing subjective data from all stakeholders in the tourism industry of the state.

The interview method followed by the researchers included questions put to the respondents about the current state of tourism and slow food in Uttarakhand, as well as the further scope of its growth and expansion. Respondents were also asked to identify the key areas in slow food tourism that required increased attention. Researchers have

also obtained information regarding the various factors that were perceived to play a significant role in the development of slow food tourism. Finally, the interview methodology also resulted in primary data about the perceived challenges and barriers to the emergence of slow food tourism as a vital part of the economy of Uttarakhand.

On the basis of primary data, collected from 680 respondents across the major destinations of Uttarakhand, researchers have conducted a content analysis to derive findings about the present scenario of slow food tourism. The assessment of primary data has shown that there was a large consensus over the role of five key factors in the growth of slow food tourism in Uttarakhand, which have been discussed in the next section.

Researchers have supported the primary data with additional secondary data. Statistics and information about recent developments in Uttarakhand by the state and central government for the development of tourism sector have been discussed in section 3 below. Relevant data has been collected from a variety of sources. The purpose of using secondary data as well was to present an objective and practical insight into the key trends in development of slow food tourism in Uttarakhand.

FINDINGS AND DISCUSSIONS

The results of content analysis of the collected primary data presented interesting findings for the present status of slow food tourism in the state of Uttarakhand, as presented below. The first section identifies the scope of slow food tourism in Uttarakhand, while the second section identifies and discussed the factors that contribute towards slow food tourism from the perspective of stakeholders in the sector.

Lastly, the third section utilizes secondary information gathered from government releases and news reports about the key developments made regarding tourism and slow food in Uttarakhand.

Slow food being served in Uttarakhand

The food offered in the pure environment amid hills and valleys of Uttarakhand is bursting with authentic flavors. Both Garhwali and Kumaoni cuisines stay authentic to food's natural tastes without an overpowering melee of spices. All food preparations are rich in nutrient factor and since they are imbibed with various herbs, lentils, cereals and pulses, they hold a staggering number of health benefits. Five tourist destinations, namely, Haridwar, Dehradun, Nainital, TehriGarhwal and Kedarnath, are major attractions for different kinds of tourism. Due to the existing presence of requisite tourism infrastructure such as hotel availability and well- equipped travel agencies; these sites are also primed for immediate development of slow food tourism in Uttarakhand. Findings from the research show that several hotels and restaurants at these tourist destinations serve slow food; the development of slow food tourism thus shows a vast scope of improvement in these places.

Role of Stakeholders in Tourism Sector

The ambit of slow food tourism at any place can be reasonably examined only after taking the viewpoint of all stakeholders into account. Hashimoto and Telfer (2006) stated that opinions and contributions of major stakeholders should be considered for a holistic view of the scenario prevailing in slow food tourism development. The input of these stakeholders in the development of slow food tourism is the backbone of this service-oriented industry. It hence follows to present a short discussion on the role of these stakeholders in slow food tourism development in Uttarakhand.

Tourists are at both the giving and receiving end of the spectrum of tourism industry. In certain places, food tourism occupies a majority chunk of the tourists visiting the destination. Since food can transform tourists' attitude towards slow food and create memory and nostalgia (Quan & Wang, 2004), the places that have few tourist

destinations can use slow food to capitalize on cultural treasures (Santich, 2004). Another important stakeholder in tourism sector is the hospitality sector. Restaurants at popular destinations typically earn about 50 percent of their revenue from travelers' pockets (McKercher et al., 2008). Local population occupies a major stake in slow food tourism since it involves the cooperation and support by local people to exist. Local populace only gives the cuisine of a country its cultural and regional identity (Rand et al., 2003). Therefore, researchers have taken care to include the insights and perspective of all affected stakeholders in the slow food tourism sector of Uttarakhand.

Among total 680 respondents, a large section comprised of tourists and local population, i.e. 156 and 329 respondents respectively. Apart from this, 56 hoteliers from 25 popular hotels and 70 restaurant managers are also included. Further data has been derived from the perspectives of 37 travel agents and 32 tourist guides, for a thorough understanding of the vast ambit of slow food tourism in Uttarakhand. Uttarakhand features great delicious diversity in its traditional cuisine. The following table (Table 1) lists slow food options identified in Uttarakhand, and the availability of the slow food between the two main districts of Uttarakhand, namely Garhwal and Kumaon.

Table 1. List of Slow Food Options and Availability in Uttarakhand

Type of Slow Food	Garhwali District	Kumaoni District
Beverage	<ul style="list-style-type: none"> • Burans Ras 	<ul style="list-style-type: none"> • Thandai
Food	<ul style="list-style-type: none"> • Thenchwani • GarhwalkaFannah • Phaana • Kaafuli • Kodeki Roti • Chaunsu 	<ul style="list-style-type: none"> • Bhatt Churkhani • AlooGutke • Bhang Chutney • Dubuk • Kumaoni Dal Vade • KadaleekaSaag
Desserts	<ul style="list-style-type: none"> • Singori • Jhangoraki Kheer 	<ul style="list-style-type: none"> • Arsa
Snacks	<ul style="list-style-type: none"> • Baadi • Gulgula 	<ul style="list-style-type: none"> • AlooTuk • Kumauni Raita

The above table indicates that there is a vast variety of slow food options in Uttarakhand, which makes it an exciting venue for slow food tourism. The authenticity of its cuisine is not marred by homogeneity of taste and culture; Uttarakhand indeed promises thrilling and exciting meals for tourists from any section of the world.

Key Factors in Slow Food Tourism in Uttarakhand (Stakeholders' Perspective)

There is need for discussion into the key factors that can influence the growth of slow food tourism. The following section discusses the key factors of slow food tourism from the stakeholders' perspective considered in this study.

Government Support and Financial Aid

The greatest factor in growth of tourism sector in any country is the support for its development given by its government. Some key responsibilities of the ministry of tourism are augmenting tourism infrastructure, easing of visa regime, and assurance of quality standards etc. The stakeholders surveyed in the study pointed out in a general consensus that for the promotion of slow food tourism, the government should be required to provide financial support to new businesses in the market. Such financial support could take the shape of subsidies, tax exemptions and business loans at low interest rates. This aid is required to protect investments and direct capital inflow into the development of this sector.

Inter-Industry Cooperation

This means forming healthy associations with rural food providers and raw material suppliers, and agencies for transport and communication. The cooperation and the understanding between the food industries and the tourism agencies is required. Further, the benefits to such business understandings are mutual; travel agencies and tour guides can help boost slow food by ensuring that the tourists interested in having a wholesome experience of travel are recommended hotels and restaurants that actively serve slow food. Similarly, hotels and restaurants pay back the favor by hiring tour guides to highlight the history and cultural value of a select dish.

Improved Infrastructure

The augmentation of tourism infrastructure includes basic amenities like transport and communication connectivity, public hygiene facilities, electricity and power, or ease of accommodation and service options. It is also essential to have a robust safety and security situation for tourists. Uttarakhand can utilize the foundations of existing infrastructural abilities for the initial development of slow food tourism. Apart from physical infrastructure, improvement in training and skill capital is also an important driver for growth in slow food tourism. Language barriers and lack of information can act as major barriers to enjoyment of slow food served to tourists (Amuquandoh, 2011). Employees of hotels and restaurants were found to be trained regularly in service skills, communication abilities and customer engagement methods.

Local Public Support and Awareness

Slow food is not merely the consumption of food; it includes the immersion of local culture into the enjoyment of food. The ambience around slow food makes it more attractive and tempting for tourists as a cultural experience on trips and holidays (Kim et al., 2009). In this experience, it is vital that they are supported by an aware local population about the nutritious benefits and enjoyment of slow food. Enthusiasts of slow food are keenly interested to know about the recipes and exotic ingredients that go into the making of slow food of that area.

Marketing & Promotion

Highlighting beneficial attributes is a crucial factor in the advancement of slow food tourism. Travel guides and tour operators indicated positive response to organizing customized tours focused on spreading knowledge about local food and culture. The business agents also showed interest in promoting slow food through specially curated restaurants and local motels for tourists. A major marketing gimmick for promoting slow food tourism can be conducted in the form of food fairs and festivals (Jung et al., 2015). Such fairs are a magnetic attraction to food-loving tourists from anywhere in the world. The success of such fairs and festivals can bring great economic profits, especially in rural or lesser known areas.

Recent Developments in favor of Slow Food Tourism

It is essential to take a look into the developments made in Uttarakhand's tourism industry over the years. These developments have had direct and indirect roles to play in the promotion of slow food tourism as well. The state's overall tourism policy is based on developing Uttarakhand's tourist destinations with special focus on pilgrimage and adventure tourism. The following section details major developments that have been carried out in the state and how they have influenced the growth of slow food tourism.

Infrastructure

The government of Uttarakhand spends considerable resources in the augmentation of quality infrastructure in the tourism industry. The government has also provided financial infrastructure for supporting development of slow food tourism in Uttarakhand. In the revenue surplus budget of 2019-2020, several provisions have been

made to boost the agricultural sector and lifestyle of farmers. Traditional crops like coarse grains, cereals etc. have been allotted additional budget of INR 104 crores for their promotion. Tourism is heavily reliant on availability of connectivity infrastructure- through roads, railway, airways and other modes of transportation. Uttarakhand government has made transportation and connectivity a top priority to ensure uninterrupted functioning of tourism industry. In terms of transport infrastructure, a breakthrough achievement was recently conducted in the shape of the largest ropeway project in the country between Mussoorie and Dehradun. The Dehradun-Mussoorie Ropeway project would provide a host of facilities for ease of tourism, including waiting lounges, food and retail counters and public amenities.

Public Awareness

For slow food tourism to sustainably exist, it must exceedingly tempt tourists from across the world about its variety, value and benefits. Public funds are to be provided for launching awareness programs, and for undertaking requisite preservation efforts. A major marketing campaign Incredible India 2.0 featured thematic creatives on niche tourism branches, including culinary or slow food tourism. Another key development in the direct promotion of slow food tourism in Uttarakhand has been through various food festivals held in the state. Several special food fairs and fests have been organized which have brought attention to Uttarakhand's traditional cuisine. Local and national media have also given attention to such organizations, which furthers their popularity. Uttarakhand government has also spread public awareness campaigns regarding the safety and security of tourists. The government releases several guidelines for the safety of tourists at regular intervals.

Quality Control

Health and hygiene are of crucial importance for many tourists and the government of Uttarakhand has taken measures to ensure complete cleanliness within the state. In 2018, the efforts of Uttarakhand state government were publicly lauded by central government and its policies were highly recommended to be followed by other states as well. The revival measures for river Ganga has had major impact on slow food tourism, since Ganga fulfilled the food grain demand of 45 percent of the local population and was the backbone of agriculture in the state. Government's development plans for the state also predict to clean all sewage lines by 2020. This focus on neatness and hygiene shall build the attractiveness of Uttarakhand as a tourist destination. In terms of slow food tourism, ambience of the local region is vital to the enjoyment of slow food. Uttarakhand government has strict licensing requirements under the Food Safety and Standards Authority of India for food business operators.

Training

Good service quality increases the chance of revisiting and remembrance by old tourists, and further welcomes new ones. Uttarakhand government has realized the scope of tourism industry in the economy. The training at several hospitality institutes enables the youth to acquire excellent customer service skills, teamwork values, attention to detail and personal grooming abilities. This enables tourists to be contented with the quality of their travel and ensures good memories to be associated with the destination. Tourists satisfied with the quality of customer service are also more open to diving deeper into local culture and heritage and are welcoming to trying local culinary options instead of regular fast food options.

Additional Government Support

Apart from investing in provision of basic services, government also identifies tourism products, preserves heritage, environment and ecology. These activities of the government provide a much-needed additional support for development of slow food

tourism as well. Government also launched campaigns to publicize the distinctive features of these new tourist destinations, including the authentic local Garhwali and Kumaoni culture. Tourists that arrive to these less- trafficked areas will find a more immersive experience in enjoying regional culinary delights. The government has also introduced regulations to ensure social, cultural & environmental sustainability in Uttarakhand. Government- designated special tourism zones are investment havens for new business ventures in the state, providing ease of business for entrepreneurs interested in development of slow food tourism. Several entities involved in the promotion of slow food tourism are entitled to ask for fiscal and other incentives under the Mega Industrial Policy 2015, and MSME Policy, 2015. The government thus offers a wide range of benefits in terms of interest incentives, financial assistance, subsidies and concessions.

CONCLUSION

Slow food tourism is an engaging avenue in the modern era; it can show significant contribution to overall tourism development of a destination. In this paper it has been shown that Uttarakhand has several unique features that ideally indicate its vast scope for a successful slow food tourist destination. The study includes identification of potential sites for developing slow food tourism, and an examination of the overall scenario in the sector. The state offers a wide variety of heritage-rich style of cuisine such as Thenchwani, Phaani, Chaunsu and more to be a commercially viable destination for slow food tourism. In a survey among stakeholders from the tourism sector of Uttarakhand, observations regarding slow food tourism have been gathered from the perspectives of tourists, hoteliers, restaurateurs, tour guides and agents, and the local population. The results suggest that there is mutual agreement among these stakeholders about Uttarakhand's unexplored capacity to attract slow food tourists.

Next, five key factors have been identified as key in driving the growth of slow food tourism are namely, improved infrastructure, marketing and promotion activities, inter-industry cooperation, local population awareness, and government aid and support. The recent developments and action plans by Government of India and state government of Uttarakhand have encouraged and aided the development of slow food tourism in the state through contribution to different sectors like infrastructure development, marketing, quality control and service training.

Practical Implications

The present study provides interesting insights into the role of slow food in development of the tourism industry based in Uttarakhand. The study has offered insight into the development of slow food tourism as a supplement to regular tourism avenues. The subjective and open-ended research methodology for all stakeholders allows for a more nuanced understanding of the current scenario in slow food tourism. The factors derived in this study by accommodating primary data collected from tourists, hoteliers, restaurateurs, tourism service providers and the general local populace, show vast opportunities for growth. The knowledge of these factors can prove to be useful for both private entrepreneurs and government agencies in utilizing slow food tourism to boost local economy. The study includes a discussion on the developments in Uttarakhand tourism which have benefitted the expanse of slow food, and this could be helpful in drafting further administrative policies and schemes for the state tourism.

Limitations and Future Research

The present research uses the unstructured interview method to collect qualitative and subjective opinions of the respondents as primary data for its findings. More probing methodologies, such as means-end relationships or larger samples involving survey research could further strengthen insights. This study was conducted with respondents

from a single state in India only, i.e. Uttarakhand. A pan-India analysis could be undertaken as basis for wider research. Comparisons with similar geographical locations across the globe could be taken into account in future research.

REFERENCES

- Amuquandoh, F.E. (2011). International tourists' concerns about traditional foods in Ghana. in: *Journal of Hospitality and Tourism Management*, 18, 1, 1-9.
- Atton, C. (2003), Reshaping social movement media for a new millennium. *Social Movement Studies*, 2, No.1, 3-15.
- Baltescu, C.A. (2016). Culinary experiences as a key tourism attraction. Case Study: Brasov County. *Bulletin of the Transilvania University of Brasov Economic Sciences*. V, 9, 2, 107- 118.
- Banerjee, O., Cicowiez, M., & Gachot, S. (2015). A quantitative framework for assessing public investment in tourism—An application to Haiti. *Tourism Management*, 51, 1, 157-173.
- Everett, S., & Aitchison, C. (2008). The role of food tourism in sustaining regional identity: A case study of Cornwall, South West England. *Journal of sustainable tourism*, 16, 2, 150-167.
- Hashimoto, A., & Telfer, D.J. (2006). Selling Canadian culinary tourism: Branding the global and the regional product. *Tourism Geographies*, 8, 1, 31-55.
- Jiménez Beltrán, J., López-Guzmán, T., & Santa-Cruz, F.G. (2016). Gastronomy and tourism: Profile and motivation of international tourism in the city of Córdoba, Spain. *Journal of Culinary Science & Technology*, 14, 4, 347-362.
- Jung, T., Ineson, E.M., Kim, M., & Yap, M.H. (2015). Influence of festival attribute qualities on Slow Food tourists' experience, satisfaction level and revisit intention: The case of the Mold Food and Drink Festival. *Journal of Vacation Marketing*, 21, 3, 277-288.
- Karim, A., Shahrim, M., Chua, B.L., & Salleh, H. (2009). Malaysia as a culinary tourism destination: international tourists' perspective. *Journal of Tourism, Hospitality & Culinary Arts*, 1, 3, 1-16.
- Kim, Y.G., Eves, A., & Scarles, C. (2009). Building a model of local food consumption on trips and holidays: A grounded theory approach. *International journal of hospitality management*, 28, 3, 423-431.
- Kivela, J., & Crofts, J.C., (2005), Gastronomy tourism: A meaningful travel market segment. *Journal of Culinary Science & Technology*, 4, 2, 39-51.
- McKercher, B., Okumus, F., & Okumus, B. (2008). Food tourism as a viable market segment: It's all how you cook the numbers. *Journal of Travel & Tourism Marketing*, 25, 2, 137-148.
- Miele, M., & Murdoch, J. (2002). The practical aesthetics of traditional cuisines: slow food in Tuscany. *Sociologia ruralis*, 42, 4, 312-328.
- Quan, S., & Wang, N. (2004). Towards a structural model of the tourist experience: An illustration from food experiences in tourism. *Tourism management*, 25, 3, 297-305.
- Rand, G.E.D., Heath, E., & Alberts, N. (2003). The role of local and regional food in destination marketing: A South African situation analysis. *Journal of Travel & Tourism Marketing*, 14, 3, 97-112.
- Santich, B. (2004). The study of gastronomy and its relevance to hospitality education and training. *International journal of hospitality management*, 23, 1, 15-24.
- Sidali, K.L., Kastenholz, E., & Bianchi, R. (2015). Food tourism, niche markets and products in rural tourism: Combining the intimacy model and the experience economy as a rural development strategy. *Journal of Sustainable Tourism*, 23, 8, 1179-1197.
- Upadhyay, Y., & Sharma, D. (2014). Culinary preferences of foreign tourists in India. *Journal of Vacation Marketing*, 20, 1, 29-39.

Submitted:
12.04.2019

Revised:
06.09.2019

Accepted and published online
09.09.2019

FACTORS AFFECTING CUSTOMERS' BEHAVIOR TOWARDS TIPPING INTENTIONS IN JORDANIAN RESTAURANTS

Hakam SHATNAWI*

Yarmouk University, Faculty of Tourism and Hotel Management, Hotel Management
Department P.O Box 566 ZipCode 21163, Irbid – Jordan, e-mail: Hakamss@yu.edu.jo

Bashar Al NAJDAMI

Al-Balqa Applied University, Faculty of Aqaba College, Hotel Management
and Tourism Science Department, Aqaba – Jordan, 19117, e-mail: najdawi@bau.edu.jo

Khaldoun KANAAN

Al-Balqa Applied University, Faculty of Aqaba College, Hotel Management
and Tourism Science Department, Aqaba – Jordan, 19117, e-mail: knanaan@bau.edu.jo

Qusay KHALEEFAH

Al-Balqa Applied University, Faculty of Aqaba College, Hotel Management
and Tourism Science Department, Aqaba – Jordan, 19117, e-mail: Q.khaleefa@bau.edu.jo

Mohammad KHASAWNEH

AL-Balqa Applied University, Faculty of Ajloun Collge, Department of Financial and
Administrative Sciences, Ajloun - Jordan, 26816, e-mail: khasawnehmohammad79@bau.edu.jo

Citation: Shatnawi, H., AL-Najdawi, B., Kanaan, K., Khaleefah, Q., & Khasawneh, M. (2019). FACTORS AFFECTING CUSTOMERS' BEHAVIOR TOWARDS TIPPING INTENTIONS IN JORDANIAN RESTAURANTS. *GeoJournal of Tourism and Geosites*, 26(3), 761–768. <https://doi.org/10.30892/gtg.26307-395>

Abstract: Jordan is considered as a peaceful and stable destination in the Middle East region. Restaurants are considered the backbone of the hospitality business in Jordan. They contribute to (40 %) of tourism employment in 2018. This article aims to discuss the factors affecting tipping intentions. A convenient sample of 624 clients was selected from restaurants in Irbid governorate, which is considered as the second-largest populated city in Jordan. The questionnaires were distributed and collected from the respondents in all 35 fine-dining restaurants working in Irbid, in order to explore the factors affecting the customers' behaviors towards tipping intentions. According to the results of this study, about 20% of the variation in the tipping intentions is attributed to service quality, food quality, restaurant environment, emotional motivations, and social motivations. Food quality has a larger effect in explaining the variation in tipping intentions as compared to the rest of the investigated factors. There was no difference between males and females towards their tipping intentions. Older frequent clients have more tipping intentions than other groups in the study community. The study recommended conducting similar surveys on other restaurant types in different governorates in Jordan as well as in neighboring countries to understand the tipping behavior of restaurant clients in different contexts.

* Corresponding author

Key words: Tipping, Gratuity, Restaurants, Customers' Behavior, Jordan

* * * * *

INTRODUCTION

The restaurants sector is considered as a major sector in the hospitality business, at least based on its economic contribution and employability. One of the most important service sectors that their workers depend on this type of common behaviors known by both the service providers (waiters, hosts, servers) and clients. The nature of the services in the restaurant industry makes it difficult for the administration to monitor the performance of the waiters and the quality of services provided to clients in restaurants. Therefore, customers' feedback is regarded as a vital part of the service monitoring and enhancement process. Tipping is considered as a major indicator of customer satisfaction and repeated visits (Lynn & Sturman, 2010). Gratuity, tip, or baksheesh are synonyms of one term describing one human behavior during some of their daily interactions with service providers. Clients usually pay some extra money on their bills to service providers in hotels and restaurants as an appreciation for the service provided (Jessica, 2015; Saayman, 2014; Azar, 2007b). It is known that human beings always seek to maximize utility by giving money only when they will get something in return, and they try to pay as little as possible as rational economic customers (Abraham, 2014).

Tips are usually given after the provision of services. Staff members cannot change the service quality in response to the amount of tip offered by customers (Jessica, 2015). Therefore, this behavior is considered bizarre. The culture of tipping is widely spread in many countries. It has become a global phenomenon and a form of socio- cultural behavior at the same time (Abraham, 2014), while some cultures such as the Japanese culture refuses this behavior (Casey, 2001). The great economic impact of the tips on a large number of workers in different sectors, including the restaurant sector, and the dependence of many workers with low salaries on tips makes it interesting to explore this research field. Understanding this culture gives us an indication of the extent to which clients are satisfied with the provided services. This may be used by restaurant managers and owners as an indicator on the service quality and client's satisfaction. On the other hand, restaurant staff could use various strategies and actions to increase their income through tipping. The economic impact of tips is substantial. Millions of workers around the world depend on tips as an additional source of income (Saunders & Lynn, 2010). Tips in the food industry in the US alone count for 47 billion dollars annually (Azar, 2010a).

Since the tipping is a deliberate and voluntary action, its explanation lies only in human motivation (Lynn, 2015). The most commonly asked questions when it comes to tips are: why human beings pay amounts of money they are not obliged to pay, especially after already receiving the service? Why some clients pay tips and others do not? And why some pay relatively big payments while others pay little? No doubt that it is difficult to know what makes a person pay and makes others abstain from paying and whether the client's personality and characteristics are the reasons behind such a decision, or there are other reasons associated with the service and environment of the restaurant. Although the phenomenon has been well studied worldwide, Jordan lacks for any research on this topic. This study attempts to explain the main motives behind the tipping behavior and the relationship between tipping on one hand, and factors such as service and food quality, restaurant environment, emotional motives, and social motives on the other hand in Jordanian restaurants. Therefore, this study attempts to answer the following questions: what are the main motives influencing client's intention to pay tips? Is there a

statistically significant relationship between clients' motives and buying intention? And does tipping behavior vary according to the demographic variable of the study sample?

TIPPING CONCEPT

Researchers argued about the origin of the word "Tip", some say it's a Latin word derived from the word "stips" which means "gift", and some say that it was derived from the Dutch word "Tippen" which means "Tap" "as "tapping the table with a coin to get the attention of the service provider", while others think that it was derived from the gypsy statement "Tipper me your money" (Lynn et al., 1993). Lynn et al., (1993) define tipping as an additional amount of money that is provided by clients to employees in order to compensate for services rendered, a form of social behavior that is influenced by values and customs. Casey (2001) proposes that money exchanged between a customer and a service provider is not subject to a particular law. Lynn (2015) points out that tipping is a deliberate voluntary act of clients directed at employees as gifts in exchange for the services provided to them. It can be said that many of the researchers that have studied this subject have indicated and agreed on a set of points: The voluntary and deliberate nature of tipping behavior, tipping as a small amounts of money paid after receiving the service; usually (10-15%) of bill amount, there is no law governing the size or form of this behavior, and the complexity of this economic and social phenomenon.

ORIGINS OF TIPPING BEHAVIOR

There is no confirmation by researchers in this domain on the origins of tipping, but they suggest that this behavior originated in the Middle Ages when feudalists threw coins to groups of beggars to buy safe passage for them on the road. Adding to that, those feudalists used to pay some extra money to their servants as a kind of appreciation for them (Azar, 2004). In Tudor England, private home visitors were tipping the servants who served them during their visit to these houses, known as "vails". The Americans, who visited Europe at that time, transferred the habit to US to prove their wealth and to prove their knowledge of the traditions of other countries. By the end of the 18th century, tipping had become an established fact in American society (Abraham, 2014). According to Azar (2004) and Brenner (2001), the origins of the tipping date back to the sixteenth century when some copper jars were placed in cafes and bars with this statement "To Ensure Promptitude" written on them, to ensure speed of service. So, it is believed that the origin of the word "tip" goes back to the initials of the previous sentence "To Ensure Promptitude" (Tip). In the Arab region, the Turks shaped part of the culture of the region, and the word "Baksheesh", according to some writers, came from the Turkish culture and it means what is provided to those who perform a simple service. Tipping culture has become widespread in most Arab countries and many workers in the food industry and other sectors rely heavily on tipping to support their low wages (Abdel Moneim, 2007; Marzouki, 2018; Badran et al., 2013).

REASONS AND MOTIVATIONS OF TIPPING

Lynn (2017) and Lynn & Brewster (2018) argued that people like the policy of tipping voluntarily and do not prefer it to be in a form of fees included in the bill. Many researchers agree that tipping behavior is an avoidable expenditure form. Many ask why consumers leave money to strangers when they are not legally obliged to do so, and do not gain any tangible benefit out of it (Lynn et al., 1993). Others pointed out that one of the main reasons for tipping workers is that it has become a social norm, and the provision of tips conform to social norms and customs, and this commitment of tipping gives them social acceptance and make them feel generous (Azar, 2007a). On the other hand,

disobeying this norm causes them embarrassment in front of others (Bodvarsson & Gibson, 1999; Aronson et al., 1999). This is consistent with the theory of Social Exchange. Azar (2003) asserts that some provide tips as a kind of sympathy for low-income workers or as a means of expressing their own kindness and generosity, while some feel strong and superior when practicing this behavior. The other reason according to Conlin et al. (2003) is the desire to have better future services. This applies to clients who want to return to the same restaurant and expect to be served by the same people.

The idea is that, through tipping, employees are motivated to provide better services in return, and sometimes customers fear that not paying tips may lead to bad services at the next visit. Thus, some people would take the initiative to pay tips. This is what (Hiler, 2015) calls the "Influence motive" which is based on the fact that the consumer wants to control current and future services. The customers give the tip because they realize that the quality of service provided by the waiter is not included in the bill and feel that the only way, they can reward employees is by tipping (Lynn, 2001). Liraz (2012) discusses that the relationship between service quality and tipping intention depends on the food quality. Wang (2010) points out that that tipping began as a sign of gratitude and appreciation and then as an expression of social status and an incentive, and finally became a custom and a socially accepted fact. In addition, Saayman (2014) conducted an exploratory survey in restaurants during the Ardklop Festival in South Africa to find out the drives that make people pay tips or abstain from paying.

The results of the study showed that the reasons for tipping are due to financial reasons, the result of good service and to gain social acceptance. Also, it showed that the behavioral variables are more influential than social and demographic variables in influencing the decision to pay the tip. Lynn (2015) revealed a motivational frame that offers reasonable interpretations for the motives of paying or not paying the tips. The so-called TMF (Tipping Motives Framework) presumed that tipping is motivated by the desire of customers to welfare the servers and build fair relations with staff, getting privileged services in the future visits and finally conforming to the social commitment or gain social acceptance. Lee and Dewald (2016) conducted a study on the tipping behavior of Chinese tourists in American restaurants. Although the culture of tipping is not widespread in China, the Chinese tourists were paying tips in different rates under the influence of the prevailing social custom in the USA, depending on the level of service provided. The main influencing factors of their tipping intentions were food prices, companions in the visit, and food. Moreover, Azar (2010b) proposed that people do not consider strategic motives represented in future service, but they consider social and psychological motives while tipping.

METHODOLOGY

The researchers used the descriptive-analytical approach. A survey was conducted among a purposive sample visiting all 35 fine-dining restaurants working in Irbid city; northern Jordan during May 2018-Jan 2019. In designing the questionnaire, the researchers reviewed some of the previous studies regarding tipping Behavior (Mok & Hansen, 1999; Artuger & Çetinsöz, 2013; Jessica, 2015; Al Najdawi et al., 2017; Shatnawi, 2019). A questionnaire consisting of five dimensions influencing the tipping behavior of clients (Service Quality, Restaurant Environment, Emotional motives, Social motives, and Food Quality), was distributed among a purposive sample of 690 clients dining in these restaurants and 624 questionnaires were returned and analyzed to comprehend clients' opinion on the main dimensions of tipping and determine the statistical correlations between the main variables of the study.

DATA ANALAYSIS AND RESULTS

The demographic distribution of the study sample reveals that 73.7% were male clients, 36.1% were between 41-50 years old, 32.4% were less than 30years old, and the rest were evenly distributed between those between 31-40 and more than 50 years old. The majority (34,1%) visited restaurants once every two weeks, followed by those who visited restaurants once a week (26%) and least were clients who visited restaurants on a daily basis (9%). Table 1 shows the Means and standard deviations of responses related to the motives which affect the intention of the customers to pay tips. Service quality and food quality were the main variables influencing the intention of clients to pay tips, whereas emotional motives were the least. Agrees with (Liraz, 2012), who confirmed a strong correlation between quality of service and the tip value. The detailed analysis of the variables influencing client intention to pay tips revealed that staff training, service style, cleanliness, price, quantity, taste, and price of food, importance of personal hygiene and the cleanliness of the restaurant are the most important variables that affect the client's intention to pay tips for workers in the restaurant. A standard multiple regression test was conducted to identify the impact of the group of variables (service quality, the restaurant environment, food quality, emotional motives, and social motives) and the dependent variable (Tipping Intention), the results as shown in Table 2.

Table 1. Overall mean and Standard Deviations of the study main dimensions

Dimension	N	Mean	Std. Deviation
Service Quality	624	4.1294	.64226
Restaurant Environment	624	3.3437	.74269
Emotional motives	624	2.6597	1.04583
Social motives	624	2.8085	.93315
Food Quality	624	4.1218	.52155

Table 2. Standard Multiple Regression tests

Model Summary						
Model	R	R Square	Adjusted R Square	Std. Error of the Estimate		
1	.450 ^a	.203	.196	.97516		
a. Predictors: (Constant), Food Quality, Service Quality, Social motives, Emotional motives, Restaurant Environment						
ANOVA						
Model		Sum of Squares	df	Mean Square	F	Sig.
1	Regression	149.326	5	29.865	31.406	.000 ^b
	Residual	587.673	618	.951		
	Total	737.000	623			
Coefficients						
Model		Unstandardized Coefficients		Standardized Coefficients	T	Sig.
		B	Std. Error	Beta		
Service Quality		.351	.063	.207	5.605	.000
Restaurant Environment		.174	.058	.119	3.007	.003
Emotional motives		.011	.081	.005	.130	.897
Social motives		.135	.043	.115	3.132	.002
Food Quality		.348	.038	.335	9.207	.000

According to the findings in Table 2 the value of the correlation coefficient between the dependent variable (Tipping Intentions) and the independent variables (service quality, the restaurant environment, food quality, emotional motives, and social motives) counted for 0.450 (R=.450) and the independent variables explain about 20% (R Square=.203) of the variance in the intention to pay Tips. It is clear that the regression is

significant (Sig. = 0.00) and the value of the variance $F=31.406$. This simple interpretative value of the influence of the group of the independent variables that had been studied certifies to us that there are many variables that might have a larger influence on the intention to pay tips, but they were not studied in this research. In order to explain the value of each independent variable (service quality, the restaurant environment, food quality, emotional motives and social motives) in the intention to pay the tips, it is clear to us that the variable of emotional motives was not statistically significant (Sig = .897) which is greater than the standard level of significance (0.05), and therefore did not have an effect in the regression equation, while the other independent variables were statistically significant and thus have an effect on the interpretation of variation in the tipping intention, where the value of the coefficient (Beta = .335) of the food quality variable and the calculated value of (T) (9.207), followed by the Service Quality Variable (Beta = .207 / T = 5.605). This result is completely different from what Azar, 2010a had said, who emphasized that people pay tips for social and psychological reasons only, not for strategic reasons and for future service considerations. It is in line with Speer, 1997; Rønhoode, 2012; Artugur & Çetinsöz, 2013; Cho, 2014, who confirmed that quality of service is the most important factor in leaving tips. Further analysis was conducted to comprehend the significant differences between the responses of the members of the study sample towards the variable of tipping intention according to the different demographic factors. It is clear that the value of the statistical significance of the T test for two independent samples were (0.110) which is greater than the level of significance ($\alpha < 0.05$). Thus, we conclude that there are no statistically significant differences between the means of study sample estimates towards the tipping intention attributed to sex factor. This finding agreed with Jewell, 2008. To find out the statistical relationship between the study sample responses towards the tipping intention according to the number of visits to restaurants, one-way ANOVA analysis was conducted as shown in Table 3.

Table 3. One -Way ANOVA Test for a number of visits to restaurants variable

Descriptive	N	Mean	Std. Deviation	ANOVA				
					Sum of Squares	df	F	Sig.
Rarely	100	3.0000	1.08886	Between Groups	29.426	4	6.436	.000
Once a month	93	3.6371	.94158	Within Groups	707.574	619		
Once every two weeks	213	3.6045	1.00556	Total	737.000	623		
Once a week	162	3.5417	1.15333					
Daily	56	3.4241	1.20691					
Total	624	3.4800	1.08765					

The results shown in Table 3 show that the level of the sign (sig) corresponding to the value of the F test is (0.000) and is less than the significance of ($\alpha = 0.05$). As a result, there are statistically significant differences in the estimates of the study sample towards the intention to pay tips attributed to the variable of a number of restaurant visits. To find out the significance of the differences between the samples, the Tukey test was conducted. And it showed what is clarified in Table 4, that there were significant differences between rarely category and once per month category in favor of once per month category which had the highest mean value 3.6371. There were also differences between rarely and once every two weeks categories in favor of the group once every two weeks with the highest mean value of 3.6045. There were also differences between rarely and once per week

category in favor of once a week category which had the highest mean (3.5417). This means that the sample member who visits restaurants weekly or monthly has a tendency to pay tips more than the survey sample members who rarely visit restaurants.

This interpretation may be associated with the idea of seeking future services as they will repeat the visit in the future, which is consistent with Conlin et al., (2003). For age group, One-Way ANOVA test was conducted. The results show that the level of a significance corresponds to the value of F test (0.002), which is less than the significance level of $p < 0.05$. Accordingly, there are statistically significant differences in the study sample estimates towards the tipping attributed to the age variable. To detect the significance of the differences between the samples, Tukey test was conducted for differences between the samples, and it revealed significant differences between the age group (less than 30 years) and (41-50) category in favor of the age group (41-50) which had the highest mean of (3.6544) and the statistical significance of (0.002). This means that the older age groups are the ones who have the highest intention to pay the tips in the Jordanian restaurants. This is consistent with Lynn (2006) and disagrees with (Jewell, 2008) study, which indicated that young people have more tendency to pay tips.

Table 4. Post Hoc Test for a number of visits to restaurants variable

Multiple Comparisons				
(I) Visit restaurants every month	(J) Visit restaurants every month	Mean Difference (I-J)	Std. Error	Sig.
Once a month	Rarely	.63710*	.15402	.000
Once every two weeks	Rarely	.60446*	.12961	.000
Once a week	Rarely	.54167*	.13597	.001

CONCLUSION

This exploratory study can be considered as a real addition to the literature related to the behavior of tipping in Jordan and the Middle East. One of the main findings of the study is that the variable food quality and service quality are the most important reasons creating tipping intention, so it must be taken into consideration by employees and managers in restaurants. The study also found that older age groups and the groups who have more frequent visits to restaurants had greater intentions to pay tips. Unlike other dimensions of the study, social motive did not have an effect on the interpretation of the tipping intention. There was no difference in the tipping intention according to clients' gender, while it is found that old people have more intention to tip than young clients. Clients who visits restaurants on weekly or monthly basis have a tendency to pay tips more than those who rarely visited restaurants. The study recommended conducting similar surveys on other restaurant types in different governorates in Jordan as well as in neighboring countries to understand the tipping behavior of restaurant clients in different contexts.

REFERENCES

- Abdel Moneim, A. (2007) Tipping a culture whose principles differ from one society to another. Issue 10441, Middle East Newspaper. 30 June 2007.
- Abraham, Z. (2014). The Influence of National Culture on Tipping Behavior.
- Al Najdawi, B.M., Khaleefah, Q., Shatnawi, H., & Al Momani, E. (2017). Measuring local tourists' perceptions in Petra city as one of seven wonders of world. *Journal of Environmental Management & Tourism*, 8(18), 427-435.
- Al-Marzouqi, M. (2018) Tipping. 2018, No. 1001, Al-Bayan Newspaper, 10/3/2018.
- Aronson, E., Wilson, T.D. & Akert, R.M. (1999). *Social Psychology*, Addison-Wesley Longman, New York, NY.
- Artuger, S., & Çetinsöz, B.C. (2013). Factors influencing the tipping propensity of restaurant customers: A study in 5-star hotels a la carte restaurants. *International Journal of Business and Social Science*, 4(17), 70-78.

- Azar, O.H. (2003). The implications of tipping for economics and management. *International Journal of Social Economics*, 30(10), 1084-1094.
- Azar, O.H. (2004). The history of tipping—from sixteenth-century England to the United States in the 1910s. *The Journal of Socio - Economics*, 33(6), 745-764.
- Azar, O. H. (2007a). The Social Norm of Tipping: A Review 1. *Journal of Applied Social Psychology*, 37(2), 380-402.
- Azar, O.H. (2007b). Why pay extra? Tipping and the importance of social norms and feelings in economic theory. *The Journal of Socio-Economics*, 36(2), 250-265.
- Azar, O.H. (2010a). Do people tip because of psychological or strategic motivations? An empirical analysis of restaurant tipping. *Applied Economics*, 42(23), 3039-3044.
- Azar, O.H. (2010b). Tipping motivations and behavior in the US and Israel. *Journal of Applied Social Psychology*, 40(2), 421-457.
- Badran, N.A., Gad, H.E., & Ma'uof, M.A. (2013) Server attitudes and restaurant tipping: tip enhancing actions, faculty of tourism and hotels journal, Suez Canal University, Egypt.
- Brenner, M.L. (2001). Tipping for Success: Secrets for How to Get in and Get Great Service. Brenmark, Sherman Oaks, CA.
- Casey, B. (2001). Tipping in New Zealand restaurants. *Cornell Hotel and Restaurant Administration Quarterly*, 42(1), 21-25.
- Cho, S.B. (2014). Factors Affecting Restaurant Consumers' Tipping Behavior. *Journal of the Korean Society for Quality Management*, 42(1), 15-32.
- Conlin, M., Lynn, M., & O'Donoghue, T. (2003). The norm of restaurant tipping. *Journal of Economic Behavior & Organization*, 52(3), 297-321.
- Hiler, J.L. (2015). The role of motives and decision rules in restaurant tipping, LSU Doctoral Dissertations. 2036.
- Jessica, J. (2015). Factor influencing customers tipping behavior in restaurant in LUZERN. *Journal Hospitality dan Manajemen Jasa*, 3(2), 13-27.
- Jewell, C.N. (2008). Factors Influencing Tipping Behavior in a Restaurant. *Psi Chi Journal of Undergraduate Research*, 13(1).
- Lee, P., Dewald, C. (2016) Tipping Practices of Chinese Tourists in U.S. Restaurants: An Exploratory Study. *Journal of Tourism and Hospitality Management*, Vol. 4, No. 2, pp. 17-34. DOI: 10.15640/jthm.v4n2a2.
- Lynn, M. (2001). Restaurant tipping and service quality: A tenuous relationship. *Cornell Hotel and Restaurant Administration Quarterly*, 42(1), 14-20.
- Lynn, M. (2006). Geodemographic differences in knowledge about the restaurant tipping norm. *Journal of Applied Social Psychology*, 36(3), 740-750.
- Lynn, M. (2015). Service gratuities and tipping: A motivational framework. *Journal of Economic Psychology*, 46, 74-88.
- Lynn, M. (2017). Should US restaurants abandon tipping? A review of the issues and evidence.
- Lynn, M., & Brewster, Z. W. (2018). A within-restaurant analysis of changes in customer satisfaction following the introduction of service inclusive pricing or automatic service charges. *International Journal of Hospitality Management*, 70, 9-15.
- Lynn, M., & Graves, J. (1996). Tipping: an incentive/reward for service? *Hospitality Research Journal*, 20(1), 1-14.
- Lynn, M., & Sturman, M. C. (2010). Tipping and service quality: A within-subjects analysis. *Journal of Hospitality and Tourism Research*, 34(2), 269-275. Reprinted with permission. All rights reserved.
- Lynn, M., Zinkhan, G. M., & Harris, J. (1993). Consumer tipping: A cross-country study. *Journal of Consumer Research*, 20(3), 478-488.
- Medler-Liraz, H. (2012). Service quality and tipping: The moderating role of the quality of food. *International Journal of Hospitality Management*, 31(4), 1327-1329.
- Mok, C., & Hansen, S. (1999). A study of factors affecting tip size in restaurants. *Journal of Restaurant & Foodservice Marketing*, 3(3-4), 49-64.
- Rønhovde, A.S. (2012). Relationship between service quality and tipping in Norway: Do perceived service quality and other factors have a relationship with tip size in Norwegian restaurants? (Master's thesis, University of Stavanger, Norway).
- Saayman, M. (2014) To tip or not to tip? *African Journal of Hospitality, Tourism and Leisure* Vol. 3 (2).
- Saunders, S.G., & Lynn, M. (2010). Why tip? An empirical test of motivations for tipping car guards. *Journal of Economic Psychology*, 31(1), 106-113.
- Shatnawi, H.S. (2019). Effect of a waitresses's head scarf (Hijab) on tipping behavior in restaurants. *African Journal of Hospitality, Tourism and Leisure*, 8 (4).
- Speer, Tibbett. (1997). "The Give and Take of Tipping." *American Demographics* (February): 51-54.
- Wang, L. (2010). An Investigation and analysis of US restaurant tipping practices and the relationship to service quality with recommendations for field application.
- ***MOTA, (2019). Ministry of Tourism & Antiquities, <https://www.mota.gov.jo/Contents/Statistics.aspx>.

ANALYSIS OF ANTHROPOGENICALLY INDUCED CHANGES IN ECOSYSTEM COMPONENTS IN THE KATUN RECREATIONAL AREA OF THE ALTAI REPUBLIC, RUSSIAN FEDERATION

Peter Yu. MALKOV*

Gorno-Altai State University (GASU), Department of Biology and Chemistry,
Gorno-Altai, Russian Federation, e-mail: malkovi@bk.ru

Tatyana N. KURILENKO

Gorno-Altai State University (GASU), Department of Biology and Chemistry,
Gorno-Altai, Russian Federation, e-mail: kurilenko5045@yandex.ru

Maria G. SUKHOVA

Gorno-Altai State University (GASU), Department of Geography and
Nature Management, Gorno-Altai, Russian Federation, e-mail: mar_gs@ngs.ru

Olga V. ZHURAVLEVA

Gorno-Altai State University (GASU), Department of Geography and
Nature Management, Gorno-Altai, Russian Federation, e-mail: juravolg@mail.ru

Alexander I. MINAEV

Gorno-Altai State University (GASU), Department of Geography and
Nature Management, Gorno-Altai, Russian Federation, e-mail: minaev-alex@yandex.ru

Citation: Malkov, P.Yu., Kurilenko, T.N., Sukhova, M.G., Zhuravleva, O.V., & Minaev, A.I. (2019). ANALYSIS OF ANTHROPOGENICALLY INDUCED CHANGES IN ECOSYSTEM COMPONENTS IN THE KATUN RECREATIONAL AREA OF THE ALTAI REPUBLIC, RUSSIAN FEDERATION. *GeoJournal of Tourism and Geosites*, 26(3), 769–779. <https://doi.org/10.30892/gtg.26308-396>

Abstract: The aim of the research is a comprehensive evaluation of the character of the impact of recreational activity and tourism on the biological communities of the Republic of Altai. The article discusses the main tendencies of changes in biological communities in the Altai Mountains proper to places of high recreational load. It is shown that as a rule, changes are manifested in the impoverishment of biological diversity, local extinction or decrease of the number of stenotopic bank types and the extension of the spatial distribution anthropopersistent species. The general regularities and specificity of the reaction of the researched groups of organisms are demonstrated.

Key words: sustainable tourism, ecosystems, mountain areas, biological diversity

* * * * *

* Corresponding author

INTRODUCTION

Tourism and recreational activities are usually seen as a viable alternative to other more destructive forms of environmental management, such as mining, timber harvesting and agriculture. Tourism normally helps to increase the employment of the local population, which favourably affects the social environment.

In addition, the development of tourism can serve as an important mechanism for the economic provision for specially protected natural areas, especially national parks (Travkina, 2002). On the other hand, negative manifestations caused by a direct impact of recreation and tourism are well known; their scale and severity require solutions at international level (Bratanovsky et al., 2014). These attributes define tourism as a dual phenomenon that is a “double-edged sword for social and ecological development” (Van der Duim & Caalders, 2002). On the cusp of the 20th and 21st centuries, there is an active search for ways of sustainable development all over the world when an important concept of “sustainable tourism” was formulated as a kind of tourism that ensures its viability over an infinitely long period of time (Butler, 1999).

The goal of sustainable tourism is to find a balance between environmental protection, preservation of cultural integrity of ethnic groups, social justice and economic benefits, as well as to meet the needs of the population in terms of living standards, both in the short and long-time perspective. At the moment, a need for comprehensive development of sustainable tourism is expressed at the level of the UN General Assembly resolution that encourages “intensified efforts on regular evaluation of the role of sustainable tourism, including ecotourism, in appropriate cases, so that more informed decisions can be made at the local and national levels, widely reproduce and apply the experience gained, especially in the context of other economic activities, and use innovative technologies to relieve social, cultural and environmental impacts of tourism” (Zhuravleva et al., 2018). The development of promising forms of sustainable tourism also involves monitoring of the state condition of the environmental biological component. This is largely due to the fact that recreational areas are usually unique natural objects characterized by an increased concentration of biological diversity, often combined with the presence of rare and endemic components. Therefore, the preservation of this diversity is both a prerequisite of the stability of recreational areas and a significant factor of their increased attractiveness for holidaymakers (Sukhova et al., 2018).

The patterns of changes in biological communities under the influence of tourism and recreational activities in the framework of this study are discussed using the example of the Altai Republic as one of the important centers of tourism and recreational industry in Russia. The number of tourists arriving at the territory of the republic increases every year and in 2017, according to data of the AR Government, it reached 2.05 million people. Maximum tourist flows are seen in the valley of the Katun River in the Mayminsky and Chemsalsky districts, where more than half of the tourist enterprises of the Altai Republic are concentrated. In 2017, 64.8% of tourists who visited the Altai Republic visited these districts. Based on the natural and climatic characteristics, the Katun Nature Reserve was created in this part of the Altai (Sukhova et al., 2014).

METHODOLOGY

Katun recreational area is within Mayminsky and Chemsalsky administrative districts of the Republic of Altai (Figure 1). The territory belongs to North-Altai physical-geographical region of Gorno-Altai Autonomous Oblast which is a part of Altai-Sayan mountain country. Orographic base is the spurs of two major submeridional ridges – Seminsky and Iolgo. A characteristic feature of the orography of North Altai, which

determines the main features of its microclimate and natural landscapes, is a combination of narrow and wide dividing ridges and valleys with a high degree of erosion dismemberment, especially in the sides of the valleys of large rivers (Novikov, 2004).



Figure 1. Geographical location of the Katun recreational area

The area is characterised by the general decrease of the height of the area in the Northern direction, namely, from the middle mountains in its Southern and central part to the low mountains in the extreme Northern part. The following main genetic types of terrain are singled out in the geomorphological structure: low-mountain and medium-mountain erosion-denudation, low-mountain erosion-accumulative with elements of tectonic-accumulative terrain (Shchukina, 1960). The valley of the Katun River is a "wind tunnel" of Altai. An air flow under the impact of the baric gradient passes through the ridges, falling on the valley bottom, adiabatically heats and takes the properties of fohns. Fohns are most typical of the cold season (90-100 cases during the year).

In January, average temperature is $-12 - (-16) ^\circ \text{C}$. However, the average wind speed in the valley is 4 or 5 m/sec, so average monthly conventional temperature is $-18 - (-20) ^\circ \text{C}$, at 1 pm is $-13 - (-16) ^\circ \text{C}$. The presence of fohns affects the structure of the weather types. In winter months, the prevailing weather is moderately severe, it is 30-50%; mild weather is 20-25%, 10-15% is the weather with positive temperatures.

The frequency of severe weather in the coldest months does not exceed 20%; very severe weather is not observed. In July, average temperature is $17-19 ^\circ \text{C}$, equivalent effective temperature (EET) is $12-15 ^\circ \text{C}$, at 1 pm is $20-21 ^\circ \text{C}$. In May and September, cold weather of V-VI types makes up about 25%, repeatability of comfortable weather is 15 or 20% and about 15% repeatability of hot weather. In summer months (July - August)

comfortable weather is 30-40% or more, cold weather is 5-10%. The daily course of weather types is expressed very clearly. In the daytime, warm and hot weather, at night this weather disappears, the greatest repeatability is typical cool weather.

The favourable bioclimatic conditions indicator in winter months is 0.70-0.80, in summer is 0.70-0.72, in spring and autumn is 0.30-0.50. During the year, the number of days with favourable weather for the human body is 220-230. According to the degree of comfort of bioclimatic conditions, the area is comfortable. The functional voltage of the thermoregulation systems is mainly minimal and weak, and to a lesser extent, average.

The main watercourse of the area is the Katun River presented by its lower course. It is flown into by more than 40 medium and small rivers and streams, the main of which are the Rivers of Maima, Sema and Chermal. The width of the Katun River valley in the area territory varies from 0.5 to 3 km. The river's depth is to 4-5 m, in low water period is to 1.5-2 m. The average flow velocity is 0.3 m/s during low water period and increases to 1.7 m/s during flood. The rivers of the district are characterised by spring and summer floods. Nutrition is mixed from melting snow (40 %), ground (40 %) and rain (20 %) waters. During rain freshets, discharge of rivers can be higher than during the flood.

The comfort of bioclimatic conditions, exceptional attractiveness of landscapes and transport accessibility make the area very promising for establishing health resorts and the organising various types of tourism. However, tourism should be of ecological character to preserve the biodiversity of the area.

The range of the studied model groups of organisms:

- vegetation cover and flora are the main producing component of any terrestrial ecosystem and the basic level of nutrition chains;
- earthworms (*Lumbricidae*) are one of the most convenient groups of organisms for studying the features of structural changes in mesobiota pedofauna;
- orthopteroid insects (*Orthoptera*) – despite relatively small number of species, orthopteroid insects, in particular locusts which are mainly phytophagous organisms, that is, primary consumers, play an extremely important role in the functioning of biogeocenoses, especially steppe and meadow ones, including those which experience a large anthropogenic load;
- day butterflies (*Hesperioideae*, *Papilionideae*) are a multi-species group, diverse in phenology, abundance and biocenotic significance, a traditional object of monitoring research;
- vertebrate animals (*Vertebrata*) are a multi-species group, diverse in its nutritional adaptation, phenology, abundance and biocenotic significance, a traditional object of monitoring research (amphibians, reptiles; birds, small mammals).

In determining the above-ground phytomass of grass cover, the method of accounting sites laid by the method of random sampling was used (Rysin & Zolotova, 1968). The air-dry mass was determined with following recalculation per 1 hectare. The traditional sweep-net method (entomological net was used) was applied to determine the abundance of orthopteroid insects. It is common knowledge that the results of catching for fifty waves, reflect the density of orthopteroid insects per 1 m² of grassy surface (Kashkarov, 1933; Sergeev, 2009). Butterflies were accounted by the route method on transects. The transect method, unlike methods of accounting sites and labeling imposes less strict requirements for the type of distribution of a species inside station (Hall, 1985).

At every of the investigated sites they walked 2 or 3 km. The specified route length is representational for the evaluation of the abundance of individual species if they repeatedly come across during the route (Thomas, 1983) as well as for the evaluation of the total abundance since a set of single species is a small part of the total

population density. The transect width was determined for every species individually by doubled average detection range (Malkov, 1994, 2005). The accounting of birds is carried out on permanent, but not strictly fixed routes without limiting the width of the transect in accordance with the methodological requirements set out in special research papers (Ravkin et al., 1999; Ravkin & Livanov, 2006). Small mammals were accounted with the help of Gero traps equipped with standard lures (bread moistened with unrefined vegetable oil) by the method of traps and lines, there was one hundred traps in every landscape, on every site and in each time season. The state of the communities was evaluated based on the analysis of the number of discovered species, total abundance and Shannon and Simpson Diversity Indices. The diversity indices take into account two components, namely, species richness and uniformity (equitability) the contribution of species to total abundance, the more species and higher the uniformity, the more diverse and structurally complex community is considered to be. The first of the indices is more sensitive to changes of the number of species, especially at low species richness, the value of the second one is affected most by abundant species (Pesenko, 1982).

The evaluation of the statistical reliability of differences of the diversity indices was performed with the help of resampling and a permutation test (Shitikov, 2012) with 9999 randomisations. All calculations were performed using Microsoft Excel and Paleontological Statistics (Hammer et al., 2001). The bulk information that served as an empirical base for generalization was collected during complex expeditions to the control and recreation-exposed areas of the main landscapes of the Katun Nature Reserve. As a result of quantitative counts, data were obtained on the abundance (density) of species of clavaceous lepidoptera (diurnal butterflies) and orthopterans, amphibians, reptiles, birds, small mammals, resources of superterraneous biomass of herbage cover and earthworms (lumbricide). Materials were partially published (Vozniychuk, 2016; Laptev et al., 2016; Malkov, 2016; Khudyakova et al., 2016). The proposed publication is an attempt of a comprehensive analysis of changes occurring in biological communities as a result of the impact of tourism and recreational environmental management.

RESULTS AND DISCUSSION

Analysis of density and diversity of biological species in the territory of the Altai Republic

Herbage cover and earthworms. The data obtained during the expeditions suggest that the superterraneous biomass of herbage cover and earthworms in the areas with increased recreational burden is normally decreased compared to those not subjected to the influence of the recreational factor. At the same time, statistically significant differences were observed in the herbage cover only; as for lumbricidea, they manifest themselves only as a trend (Laptev et al., 2016). Less pronounced differences in the lyumbricide biomass between the sites with and without recreational impact, in our opinion, are due to the greater stability of the soil environment compared to the ground-air one. A high content of organic matter of the soil, as well as a relatively low level of daily and seasonal fluctuations in temperature and chemical composition, apparently compensate for the negative impact of the recreational factor.

Excessive recreational load causes a change of species composition, especially noticeable in meadow communities. As a rule, this is manifested in the emergence of semi-ruderal plants such as *Rhinanthus minor*, *Verbascum densiflorum*, various species of eyebrights *Euphrasia*, rosette forms of dandelions *Taraxacum*, plantains *Plantago* and meadow weeds *Echium vulgare*, *Nepeta sibirica*, *Prunella vulgaris*, *Lamium album*. From other species on degraded meadows one can note a mass

development of *Achillea millefolium*, *Alchemilla vulgaris*, *Geranium pratense*, *Potentilla anserina*, *Polygonum aviculare*, *Trifolium repens*, *Capsella bursa-pastoris*. In the areas of meadow communities which are not affected or weakly affected by anthropogenic activity the flora does not contain these species or they are single. From the permanent types of such communities one should note *Phleum pratense*, *Alopecurus pratensis*, *Poa pratensis*, *Bistorta officinalis*, *Geum rivale*, *Sanguisorba officinalis*, *Trifolium pratense*, *Origanum vulgare*, *Tragopogon pratensis*, various species of bloodroots *Potentilla*, meadow rues *Thalictrum*, forget-me-nots *Myosotis* and others.

Orthopterans. Orthopteran communities of the Katun Nature Reserve react to the tourism and recreational impact by qualitative and quantitative reorganizations of the species composition and structure. Comparison of intra-landscape differences between the control and recreational areas shows that the latter, as a rule, are covered by a large number of species. In particular, in forest biotopes, anthropogenic changes in the herbage cover structure allows a high density of the northern steppe and meadow species – *Conocephalus dorsalis*, *Glyptothorax biguttulus* and *Chorthippus apricarius*. In the meadows of the Katun valley exposed to recreational activities, a relatively high density of polyzonal *Chorthippus albomarginatus* and *Locusta migratoria* (Figure 2), as well as two non-moral species, *Stethophyma grossum* and *Mecostethus alliaceus*, is observed. The density of their populations in similar biotopes, but mildly disturbed recreation sites, is noticeably lower, or they are not found there at all. In some situations, a high level of recreational exposure can lead to more complex adjustments. On dry meadows, *Euthystira brachyptera*, *Stenobothrus lineatus*, *Megaulacothorax aethalinus* and *Conocephalus dorsalis* drop out of the community but the density of *Metrioptera brachyptera*, *Psophus stridulus* and *Chorthippus apricarius* increases.



Figure 2. *Locusta migratoria* Linnaeus, 1758 (photo by N.E. Khudyakov)

Therefore, depending on the landscape type, the recreational factor can both increase the distribution range and the number of certain species of orthoptera and have a negative limiting effect. Local disappearances or reductions in the number of stenotopic

species of orthoptera in recreational areas are, as a rule, compensated by the population of new, more anthropotolerant elements (Khudyakova et al., 2016).

Diurnal butterflies. A clear trend towards a reduction in the butterfly species richness under the influence of recreational activities was observed. To a large extent, this refers to the Katun Nature Reserve meadow biotopes, which are normally characterized by *Melitaea athalia*, *M. latonigena* metalmarks, *Clossiana dia* pearl butterfly (Figure 3), *Cl. euphrasyne*, *Coenonympha glycerion* chestnut heath, *Maculinea teleius* and *Plebejus argus* blues. An increased recreational burden results in a sharp decrease in their abundance, in some places local extinction. The species composition of the population of clavaceous lepidoptera in forest biotopes is generally more resistant to the recreational burden. In addition, due to the reduction in the density of tree-shrub undergrowth, an increase in mosaic elements, mainly paths, unpaved roads and small grass fields, some meadow species penetrate forest recreational areas. However, even in this case, species of butterflies that were absent in the recreational areas were found, compared to usual and even numerous in the control areas. These include, in particular, *Argynnis sagana* pearl butterflies (Figure 4), as well as *Carterocephalus silvicolus*, *Polygonia c-album*, *Erebia ligea* and *Celastrina argiolus* (Malkov, 2016).

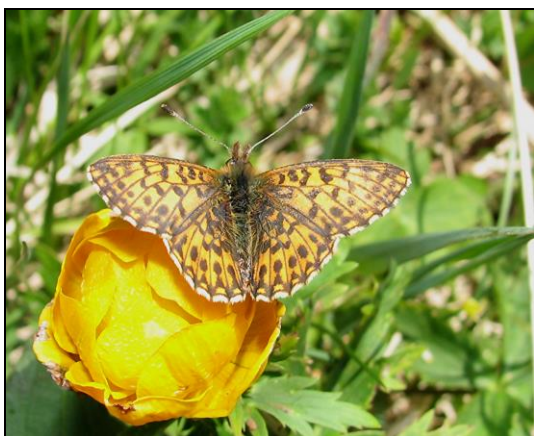


Figure 3. *Clossiana dia* (Linnaeus, 1767)



Figure 4. *Argynnis sagana* Doubleday, 1847

Amphibians and reptiles. An ambiguous reaction of the amphibian and reptile communities to anthropogenic pressure was observed. At the same time, the nature of changes in the communities depends on the intensity of recreational use of natural resources and on the degree of moistening of habitats. Under moderate and low moistening, recreation adversely affects the amphibian and reptile communities and on wetlands, on the contrary, increases the range of distribution and number of most species (Vozniyuchuk, 2016). *Birds.* The nature of changes in ornitocomplexes of the Katun Nature Reserve also depends to a large extent on the type of habitat. In forest biotopes, the species diversity of birds decreases under the influence of the recreational factor. The following species demonstrate a decrease in abundance under tourism burden – *Buteo buteo* buzzard, *Bonasa bonasia* grouse, *Streptopelia orientalis* eastern turtledove, *Dryocopus martius* black woodpecker, *Dendrocopos major* spotted woodpecker, *Anthus trivialis* tree pipit, *Lanius collurio* red-backed shrike (Figure 5), *Luscinia* common nightingale, *Luscinia calliope* red-necked nightingale, *Turdus pilaris* fieldfare (Figure 6), *Phylloscopus trochiloides* green hemlock, *Periparus ater* coal tit. Among meadow biotopes, such an

obvious reduction in the abundance of birds is not observed, but there the number of the optional synanthropus, the common magpie *Pica pica*, increases significantly.



Figure 5. *Lanius colluro* Linnaeus, 1758



Figure 6. *Turdus pilaris* (Linnaeus, 1758)

Small mammals. The analysis of distribution of small mammal species across natural landscapes and their deviates in some cases demonstrates an ambiguous situation when a particular species in one type of habitat was found only in the areas exposed to anthropogenic pressure, and in another biotope, only in the control areas. This mainly refers to shrews. As for the rodents, the Asian Chipmunk *Tamias sibiricus* (Figure 7), the common hamster *Cricetus cricetus*, the small forest mouse *Apodemus uralensis*, the gray red-backed vole *Myodes rufocanus* and the root vole *Microtus oeconomus* show a steady tendency to avoid places with an increased concentration of tourists and recreational impact.

Features of tourism impact on biological diversity

The analysis shows a number of changes occurring in the communities of various groups of organisms resulting from the intensive impact of tourism and recreation in the Katun Nature Reserve of the Altai Republic. The nature of rearrangements in the studied groups is not expected to coincide in detail, since they differ significantly in evolutionary and ecological terms, but the overall focus normally remains the same, i.e. a reduction in the abundance of the species most sensitive to anthropogenic impact. In the orthopteran and clavaceous lepidoptera communities, as well as among part of birds, these changes are partly compensated by the appearance or increase in the abundance of more anthropotolerant elements, however, such rearrangements are not evidence of stability, but, on the contrary, can have serious negative consequences.

The above changes are not the only emerging environmental problems in the Katun Nature Reserve. The ARI “Ecology” employees, in a series of studies during 2012–2015, based on the quantitative data on the ground cover digression and recreational burden in places of unorganized recreation (Report on the research project..., 2012; Pavlova, 2015; Pavlova et al., 2013), believed that if the existing trends persisted by 2018, self-regeneration of the ground cover at some sites of the Katun Nature Reserve would be impossible. Without engaging in a discussion regarding self-regeneration, we would note that the situation has worsened since that time, as predicted by them. The same authors noted an increase in the number of dry and severely weakened trees in the areas of mass recreation, as well as the accumulation of siderophile (Ti, V, Mn), chalcophile (Ni, Cu, Zn) and biogenic (P, B) elements in the foliage (Pavlova et al., 2012).



Figure 7. *Tamias sibiricus* (Laxmann, 1769)

Negative aspects of the impact of tourism development in the Altai Republic on ungulate populations are discussed in the work of Yu.N. Kalinkin (2012). The main focus of this publication is poaching, commercial hunting and, only partly, a disturbance factor, which is completely true for the eastern and southern part of the Altai Republic. In the conditions of the Katun Nature Reserve, a disturbance factor, in our opinion, is of paramount importance, since there is significantly higher concentration of tourists. Some of them have offroad vehicles, including ATVs and snowmobiles, which greatly expands the possibilities of movement. It is important that the territory of the Katun Nature Reserve is one of the main ways of seasonal migrations of the Siberian roe deer *Capreolus pygargus* from the foothill part of Altai to the hinterlands (autumn) and back (spring) (Sobansky, 2008). Therefore, the tourism and recreational sector has become a significant factor of a negative impact on the environment of certain territories of the Altai Republic. Irrational operation leads to the destruction of their potential.

At the same time, a unique recreational resource of the Altai Republic is one of the very few among those involved in its economy and competitive on the Russian and world markets. The actual task, in our opinion, is to create economic (tax) and informational conditions for spending part of the funds of tourist companies to support the ecological conditions of the territory, which is not actually reflected even as a recommendation. This situation is due to the fact that the bulk of tax deductions goes to the budget of the

regions where travel agencies are officially registered (Altai Krai, Novosibirsk and Kemerovo region, Moscow), and the republic receives funds only from the lease of land plots, occupied by the objects of tourism and recreational infrastructure. Improvement of the situation can occur with the full support of sustainable tourism, carried out mainly by the residents of the Altai Republic, especially since the interest in “green” tourism, in particular, living in rural houses, is increasing, as well as with the proper redistribution of tourist flows to the Central and Southeast Altai.

CONCLUSION

This article analyses the biological diversity of the Altai Republic. The impact of tourism and recreational activities on the natural ecosystems of the Altai is discussed. It is established that the number of amphibians depends not only on the degree of the territory's moisture, but also on the intensity of recreational load. This study was aimed at the development of a framework for a comprehensive assessment of the potential of the territory, including the assessment of natural conditions and resources, anthropogenic and recreational development, ecological conditions of the area and the impact of tourism on these components. Recreation and tourism are the main strategically important areas of regional development. A special economic zone of tourism and recreational type is created in the territory of the Republic. The basis for its creation was a unique recreational potential and natural importance. This will ensure the development of the economic potential of the Altai Republic but, at the same time, the need to preserve the historical and natural heritage of the republic, social development and sustainable use of natural resources deserve attention.

The following species were studied during complex expeditions: earthworms, orthopteran insects, diurnal butterflies, amphibians and reptiles, small mammals. It was established that the number of amphibians depended both on the intensity of the recreational burden and a degree of moistening of the territory. The development of tourism may also lead to the reduction in some insect species (*Euthystira brachyptera*, *Stenobothrus lineatus*, *Megaulacobothrus aethalinus*, *Conocephalus dorsalis*, *Meltiaea athalia*, *M. latonigena*, *Argynnis sagana*, *Clossiana dia*, *Cl. Euprhosyne*, *Coenonympha glycerion*, *Maculinea teleius*) and increase in the distribution of others (*Metriopectera brachyptera*, *Psophus stridulus* and *Chorthippus apricarius*). The study analyses the changes that occur in the communities of various biological species. The negative impact of tourism on the environment is due to the irrational exploitation of recreational areas. At the same time, negative changes prevail, causing significant and increasing damage to it. The resolution of this problem requires a systematic approach, which would include a variety of interrelated measures while using natural resources for tourism purposes. Such interventions imply the use of additional technical, organizational, sociological, resource management and environmental knowledge.

Aknowlegments

The work was done within the framework of the state task of the Ministry of Education and Science of the Russian Federation 5.5702.2017/8.9.

REFERENCES

- Bratanovsky, S.N., Bratanovskaya, M.S., & Kocherga, S.A. (2014). *Legal Regulation of Tourism in the Russian Federation*. Moscow: Direkt-Media.
- Butler, R. (1999). Sustainable Tourism: a State-Of-The-Art Review. *Tourism Geographies*, 1(1), 7-25.
- Gall, L.F. (1985). Measuring the Size of Lepidopteran Populations. *Journal of Research on the Lepidoptera*, 2(24), 97-116.

- Hammer, Ø., Harper, D.A.T., & Ryan, P.D. (2001). PAST: Paleontological Statistics Software Package for Education and Data Analysis. *Palaeontologia Electronica*, 4(1), 1-9.
- Kalinkin, Yu.N. (2012). The Impact of Tourism Development on the Ungulates of the Altai Republic. *Modern problems of nature management, hunting and fur farming*, 1, 39-40.
- Kashkarov, D.N. (1933). *The Environment and the Community (Basics of Synecology)*. Moscow: State Medical Publishing House.
- Khudyakova, N.E., Malkov, P.Yu., & Khudyakova, T.S. (2016). Assessment of the Impact of Recreational Nature Management on the Population of *Orthoptera* in the Katunsky Recreation Area of the Republic of Altai. *Scientific Review. Biological Sciences*, 6, 76-80.
- Laptev, V.A., Lapteva, T.O., & Malkov, P.Yu. (2016). Impact of Recreational Nature Management on Biomass Lymbrioid and Aboveground Phytomass of Grass Cover in Some Landscapes of the Katunsky Recreation Area of the Altai Republic. *Sciences of Europe*, 9, 7-10.
- Malkov, P.Y. (2005). *Quantitative Analysis of Biological Data*. Gorno-Altai: RIO GAGU.
- Malkov, P.Yu. (2016). The Impact of Recreational Nature Management on the Biotopic Groupings of Diurnal Butterflies (on the Example of the Katunsky Recreation Area of the Altai Republic). *International Journal of Applied and Fundamental Research*, 9(2), 252-256.
- Malkov, Y.P. (1994). To the Method of Accounting for the Clavaceous Lepidoptera. In: *Animal World of the Altai-Sayan Mountainous Country*. Gorno-Altai: Publishing House of the Gorno-Altai State University, 33-36.
- Novikov, I.S. (2004). *Morphotectonics of Altai*. Moscow: Publishing House of the SB RAS.
- Pavlov, K.S. (2015). *Evaluation of the Geo-Ecological Consequences of Unorganized Mass Recreation in the Katunsky Recreation Area of the Altai Republic*. Novosibirsk: Institute of Water and Ecological Problems SB RAS.
- Pavlova, K.S., Robertus, Yu.V., & Kivatskaya, A.V. (2013). The Nature of Changes in the Properties and Composition of Soils in Recreational Areas (on the Example of the Katunsky District of the Altai Republic). *The World of Science, Culture and Education*, 38(1), 338-342.
- Pavlova, K.S., Robertus, Yu.V., Kivatskaya, A.V., & Shevchenko, G.A. (2012). New Data on the State of the Stand in the Katunsky Recreation Area (Altai Republic). *Natural Resources of Gorny Altai*, 1-2, 119-121.
- Pesenko, Yu.A. (1982). Principles and methods of quantitative analysis in faunistic studies. Moscow: Nauka.
- Ravkin, Yu.S., & Livanov, S.G. (2008). *Factor Zoogeography: Principles, Methods and Theoretical Ideas*. Novosibirsk: Nauka.
- Ravkin, Yu.S., Livanov, S.G., & Pokrovskaya, I.V. (1999). Monitoring the Diversity of Vertebrates in Specially Protected Natural Territories. In: *Organization of Scientific Research in Reserves and National Parks*. Moscow: Nauka, 103-142.
- Rysin, L.P., & Zolotova, F.N. (1968). To the Method of Determining the Productivity of the Above-Ground Part of the Grass Cover. In: *Complicated Forests of Coniferous-Deciduous Forests and Ways of Farming in the Park and Forest Conditions of the Moscow Region*. Moscow: Nauka, 138-144.
- Sergeev, M.G. (2009). Horthobiont Arthropods in the Terrestrial Ecosystems of the West Siberian Plain: Estimates of Carbon Stocks. *Bulletin of the Novosibirsk State University. Biology, clinical medicine*, 9(4), 71-74.
- Shchukina, E.N. (1960). Patterns of Placement of Quaternary Sediments and Their Stratigraphy on the Territory of Altai. *Proceedings of the Geological Institute of the USSR Academy of Sciences*, 26, 127-164.
- Shitikov, V.K. (2012). Using Randomization and Bootstrap when Processing the Results of Environmental Observations. *Principles of Ecology*, 1(1), 4-24.
- Sobansky, G.G. (2008). *Beasts of Altai. Part 1. Large Predators and Ungulates*. Moscow: KMK.
- Sukhova, M.G., Zhuravleva, O.V., Kocheeva, N.A., Minayev, A.I., Karanin, A.V., Bolbukh, T.V., Nikolchenko, Yu.N., Bakulin, A.A., & Roldugin, V.V. (2014). The Natural Climatic Conditions for the Economic Activity in Mountain Areas (in the Case of the Altai Republic). *Life Science Journal*, 11, 664-668.
- Sukhova, M.G., Zhuravleva, O.V., Vinokurov, Y.I., Chernova, E.O., & Kaizer, M.I. (2018). Recreation and Bioclimatic Specifics of Landscapes of the Central and South-Eastern Altai. *Periodico Tche Quimica*, 15(Special Issue 1), 537-547.
- Thomas, J.A. (1983). A Quick Method for Estimating Butterfly Numbers During Surveys. *Biological Conservation*, 27, 195-211.
- Travkina, M.Yu. (2002). *Regulated Tourism and Recreation in the National Parks of Russia*. Moscow: Wildlife Conservation Center Publishing House.
- Van der Duim, R., & Caalders, J. (2002). Biodiversity and Tourism: Impacts and Interventions. *Annals of Tourism Research*, 29(3), 743-761.
- Voznyichuk, O.P. (2016). Assessment of the Nature of the Impact of Tourist Nature on the Population of Amphibians and Reptiles Katunsky Recreational District of the Republic of Altai. *Interactive Science*, 10, 18-23.
- Zhuravleva, O.V., Sukhova, M.G., Karanin, A.V., & Malkov, P.Yu. (2018). Relative Sustainability of the Altai Transborder Ecosystems. *Periodico Tche Quimica*, 15(30), 660-669.

Submitted:
25.04.2019

Revised:
10.09.2019

Accepted and published online
12.09.2019

PROVIDING A NEW APPROACH TO ASSESSING TOURISM SUITABILITY IN IRAN (CASE STUDY: BADAREH CITY, ILAM PROVINCE, ZAGROS REGION)

Ali NAJAFIFAR*

Research Division of Natural Resources, Ilam Agricultural and Natural
Resources Research Center (AREEO), Ilam, Iran, e-mail: alinajafifar@yahoo.com.

Jafar HOSEINZADEH

Ilam University, Department of Forestry, Faculty
of Agriculture, Ilam, Iran, e-mail: j.hoseinzadeh@gmail.com

Hamidreza MOJARADI-GILAN

Department of Jihad-e-Daneshgahi (ACECR),
Kermanshah, Iran, e-mail: hd.mojaradi@gmail.com

Citation: Najafifar, A., Hoseinzadeh, J., & Mojaradi-Gilan, H. (2019). PROVIDING A NEW APPROACH TO ASSESSING TOURISM SUITABILITY IN IRAN (CASE STUDY: BADAREH CITY, ILAM PROVINCE, ZAGROS REGION). *GeoJournal of Tourism and Geosites*, 26(3), 780–793. <https://doi.org/10.30892/gtg.26309-397>

Abstract: Tourism suitability in Iran is evaluated using a systematic model in the form of two macro scales (extensive and intensive). The purpose of this study was to introduce a new approach in this regard based on the capabilities of all components of tourism land-uses and in accordance with new techniques and methods of assessment. Evaluation criteria were distributed in two general and specific groups using fuzzy logic. General criteria were involved in the evaluation of all tourist land-uses, but specific criteria were specific to the evaluation of a particular land-use. The weight of land-use evaluation criteria, the weight of general criteria relative to the specific criteria as well as the weight of land-uses were determined in assessing the total tourism suitability of the region based on the ANP and Delphi techniques. Finally, the capability of each tourism specific land-use and the total tourism capabilities of the region were assessed based on the layers of specific and general criteria using the WLC linear approach, and then, along with other land-uses of the region, was explored using the MOLA exploratory method. The area allocated to five land-uses of climbing, picnic and camping, kite and gliders, rock climbing and snowboarding were 61.8, 2, 4.2 and 4.3 and 4 percent, respectively. The value for visiting archaeological and cultural assets and the average total value of tourism in the region were determined to be 178.5 and 47 (in the fuzzy range of 0-255), respectively. Providing accurate assessment of tourism suitability using the cluster structure based on their respective land-use capabilities and through the use of digital multi-factor evaluation techniques with fuzzy logic and ANP weighting technique are the benefits of this new approach.

Words: Analytic Network Process, Evaluation Model, Fuzzy Logic, Tourism, Weighted Linear Combination

* * * * *

INTRODUCTION

The continuous increase of tourism destinations and the volume of investments on this has made the tourism industry a key driver of the progress of the countries' economy (UNWTO, 2017). The optimal evaluation of tourism is always an important challenge for managers and its consideration in the planning of multiple uses of forest areas has a double importance in terms of the sustainability of these ecosystems.

The evolution of the early studies of the status quo (existent) situation of the land (in terms of inventory and demand) has changed to explore the possible capability of tourism in terms of tourism resources or capability (Iatu, 2010). There are two main trends in describing tourism potential. Glavan, defines it as "the sum of possibilities that the natural and social environment puts at disposal of tourism activities" (Glavan, 2000).

On the contrary, (Muntele & Iatu, 2006) considered it the "set of objective and subjective conditions", and other similar definitions, their main approach focusing on its immaterial nature of the assessment of tourism capability. The immaterial approaches emphasize that tourism capability is a prerequisite and a reliable precondition for the possible occurrence of tourism activity in a particular region (Iatu, 2010). Since the mid-1990s, there are more sophisticated geo-cultural approaches in the tourism assessment based on the ability of natural or human elements in the form of surveys of social mentality (tourist interests) (O'Riordan, 1971). Attractiveness is an important tool for measuring the tourism system. The approaches to evaluate the attractiveness of tourism was developed by Smith (Smith, 1987). This approach provides a better description of the relationship between the possible and the actual status of tourism (existent) and between the Supply and the Consumed (Boyd et al., 1995). Important research resources have been reported in assessing tourism capability based on the potential of attractiveness (Berry, 1991; Boyd & Butler, 1996; Priskin, 2001; Tsaour et al., 2006; Dezs, 2008; Ielenicz & Comanescu, 2009; Asami et al., 2009; McClinchey & Carmichael, 2010).

Various approaches to tourism attraction study are based on resource classification and landscape quality assessment methods, as well as landscape assessment through the bachelor's knowledge, visual rating, field surveys and aerial imagery analysis (Litton, 1968). Aerial imagery has been widely used in landscape attractiveness assessment (Lynch & Gimblett, 1992). From other common approaches to assessing the attractiveness of tourism is the approach based on the assessment of demand using the views of tourists and locals based on the expert knowledge (Ferrario, 1979; Dowling, 1993; Cohen et al., 2014; Song et al., 2014). Landscape-based assessment techniques based on the scenic quality indices have also been used extensively in tourism valuation studies (Moss & Nickling, 1980; Mitchell, 1989; Cocklin et al., 1990; Yildirim & Olmez, 2008; Marzuki, 2011). In New Zealand, a method for assessing tourism is presented with a combination of two approaches of landscape quality assessment and assessment based on land-uses.

The classification of resources in this method is based on the elements of landscape type and land cover using aerial images, topography and field controls (Cocklin et al., 1990). Moreover, a method for evaluating natural tourism resources based on the approach of qualitative classification using the qualitative weighting system is presented (Priskin, 2001). In the past, due to the lack of digital processing in the form of spatial information

systems and limitations in the number of measurable spatial options, the process of collecting and analyzing data and deciding on the initial evaluation models is often accomplished through overlapping of Polygon maps and at the level of micro-ecosystems of the land. The above-mentioned approach was first proposed by MiekharK using the method of overlaying of ecological layers (McHarg, 1969). Worldwide, using this approach has been developed based on traditional mapping techniques or in conjunction with GIS.

Another approach to assessing the land in the past was the method of networks that was prevalent in the UK. In this method, the land is evaluated in the form of a network of quadrangle and based on the average values of the characteristics of the samples, and then, the final strategy is adopted by adding other criteria such as wildlife conservation and land-use (Smith, 1982). The quadrangle size used in this method varies from one to 10 square kilometers (Makhdoom, 2006). With the development of GIS capabilities, it is possible to evaluate the land based on the base pixel maps, which is in fact the development of the method of networks in the form of squared units with much smaller dimensions, so that, today, most evaluation studies are using multi-criteria methods based on the pixel maps (Berry, 1991; Boyd & Butler, 1996; Ringo Linder, 2009; Suvdantsetseg, et al., 2010; Suvdantsetseg et al., 2011).

The Makhdoom (2006) systemic spatial planning method, which has been used for many years in Iran, is, in fact, derived from the Machart ecosystem boundary. The spatial planning in this method is carried out using two sug models (qualitative-deductive and corrected quantitative-deductive) of Nakos (1984). The tourism assessment model of the above method is still used in Iran (Pirmohammadi et al., 2010; Eskandari et al., 2013; Karami et al., 2014; Ghadiri Masoom et al., 2015; Ahmadi Sani et al., 2016). Tourism capability in the systemic method is evaluated in the form of main classes of extensive and intensive categories. However, in recent years, few attempts have been made to evaluate the specific capabilities of some tourism land-use in Iran, but so far, the lack of a comprehensive model that allows land-use tourism evaluation on the basis of various land-use details and in accordance with modern conditions and techniques is evident.

In this regard, the use of geometric means of criteria in ecotourism evaluation is considered more appropriate than the systematic method (Jokar et al., 2014). Moreover, in carrying out a research, five land-use capabilities including climbing, skiing and winter sports, nature therapy (hot springs), and water sports and fishing in the Sabalan region were evaluated using the boolean functions (Movahedi et al., 2013). Studies on comparing tourism suitability in different regions of Iran have also been done using TOPSIS multi-criteria decision making method (Asadi & Daryaei, 2011; Amanpour et al., 2012; Nasrollahi et al., 2014). According to the World Economic Forum's 2017 report, Iran ranked 93 and 119 in terms of competitiveness and environmental sustainability indicators (Schwab, 2017). Accordingly, presentation of a suitable tourism assessment approach allows for the proper recognition of existing capabilities and promotion of environmental sustainability indicators in the development of Iran. The purpose of this study was to introduce a comprehensive land-use Tourism Assessment Model, in line with newly evaluated and flexible techniques for adaptation to different regions of Iran.

RESEARCH AREA

This study was carried out in western Iran, in the southern Zagros Growth Block, located in the northern heights of Kabirkouh, Badra city, Ilam province. Iran is located in Southwest Asia (Middle East). It is bounded on the south by Khuzestan province, on the east by Lorestan province, on the north by Kermanshah province, and on the west by Iraq country. The average rainfall of the 30 year period is 572 mm, based on Ilam Meteorological

Station data. The ombrothermic diagram of the station indicates that the region has a dry period (the vegetative period of the trees) from mid-May to late October.

The study area is 16,825 ha and it extends from 33° 13' 12" to 33° 23' 1" northern latitudes and extends from 46° 53' 27" to 47° 5' 4" eastern. The altitude range is from 700 to 2500 meters above sea level. The geographic location image of the study area is presented in Figure 1. The geomorphic facies of the area are mountainous and the vegetation cover is the woodland with the dominant species of oak (*Quercus Branti*). Natural features and a fair variety of tourist attractions are the reasons for choosing this area.

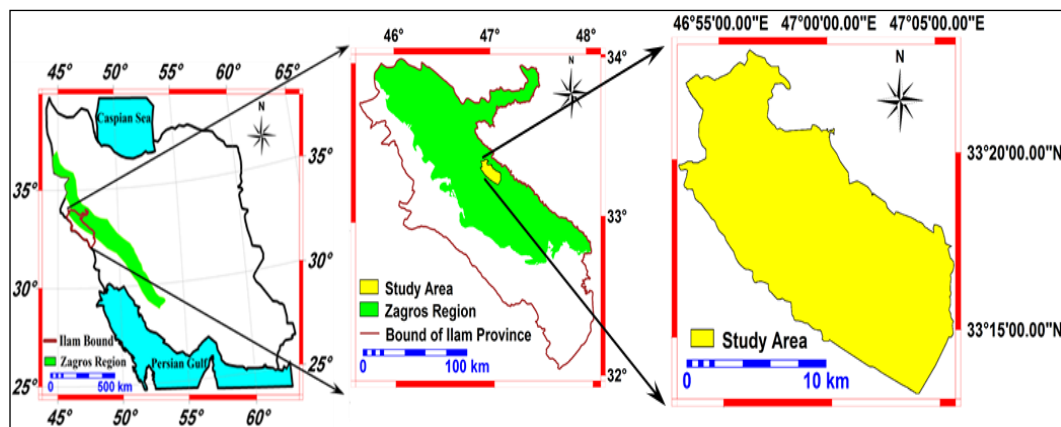


Figure 1. Location Map of the study area in the Ilam Province, Zagros region and Iran

RESEARCH METHOD

In this research, a new sustainable approach was introduced to evaluate tourism suitability. In this approach, firstly, tourism land-uses were evaluated separately and then the overall tourism functioning was determined based on it. Accordingly, the criteria for evaluation were divided into two general and specific groups. The general criteria included the factors that contribute to the assessment of the capability of all tourism land-uses and, instead, the specific criteria are exclusively specific to the land-use type being evaluated. Evaluation criteria were selected according to environmental sustainability indicators. In the implementation of research, first, the overall capability of the region in terms of general tourism criteria and then the ability to develop current or potential tourism uses based on specific criteria were evaluated. For this purpose, the weight of the criteria related to the models for assessing the land-uses and the general and specific criteria relative to each other, as well as the weight of each land-use, in the general tourism capability assessment model was determined using the ANP (Analytic Network Process) method.

For this, clustering of the network structure of the criteria and sub-criteria and the survey forms profile were determined based on a review of the sources, experts' opinion and Delphi methodology. The ANP process can be divided into two parts: control hierarchy and network communication. The control hierarchy incorporates the relationship between the goal, the criteria and the sub-criteria, influences the internal relationship of the system, and the network relationship show the dependence between elements and clusters. ANP is done in four different stages. The first step is to build the model and convert the problem into a network structure. The formation of a binary comparison matrix and determination of priority vectors and then, the formation of unweighted super matrix and its conversion to the limit super matrix were carried out in

steps two and three, respectively, and finally, in the final step, a ranking was made for the evaluation criteria (Zabardast, 2010). The survey was conducted on the basis of the views of 20 experienced experts working in the Zagros Research and Implementation Departments. The comparison of the fuzzy network analysis criteria or sub-criteria is described in Table 1 and were performed based on the geometric mean of the paired comparison, the views of different experts with a maximum inconsistency rate of 0.1. Eigen-vector of the network model was calculated based on the results of the sum of paired comparison (Saaty, 1999), in the form of logarithmic least squares method (Lin & Hsu, 2011).

Table 1. Fuzzy spectrum and its corresponding verbal phrases
to compare the criteria of the ANP model (Data source: (Lin & Hsu, 2011))

Code	Verbal phrase	Fuzzy numbers	Code	Verbal phrase	Fuzzy numbers	Code	Verbal phrase	Fuzzy numbers
1	Equal preference	(1, 1, 1)	4	Moderate to high preference	(3, 3.5, 4)	7	Extremely high preference	(5, 5.5, 6)
2	Low to moderate preferences	(1, 1.5, 1.5)	5	High preference	(3, 4, 4.5)	8	Extremely high to quite high preference	(5, 6, 7)
3	Moderate preference	(1, 2, 2)	6	High to extremely high preference	(3, 4.5, 5)	9	Quite high preference	(5, 7, 9)

In the next step, the eigen-vector (W_{ij}) matrices derived from the paired comparison of the second stage were used to calculate the final weight of the components of each level based on Equ 1 (Lin & Hsu, 2011).

$$\text{Equ 1: } W_i^* = W_{ii} \times W_{i(i-1)} \times W_{i-1}^*$$

In Equ 1, (W_i^*) is final weight of the components of level I, (W_{ii}) is eigen-vector matrix of the internal relations, ($W_{i(i-1)}$) is eigen-vector of the level i, and (W_{i-1}^*) is final weight of the higher level. If there is no W_{ii} matrix for a level, an identity matrix is replaced by Equ 2.

$$\text{Equ 2: } W_i^* = I \times W_{i(i-1)} \times W_{i-1}^*$$

In Equ 2, Parameters (W_i^*), (W_{ii}) and ($W_{i(i-1)}$) are described in equation 1. (I) is the identity matrix and its value is 1.

In the end, the final capability of each specific land-use was determined based on the utility layout of the specific and general criteria and according to the weight of each of these layers using the WLC method. In combination of general and specific layers, in order to evaluate the ultimate land-use capability, visiting national cultural works, instead of directly using the general criteria layer, the average value of the pixels of the mentioned layer, which has a fixed value throughout the study area, has been used. Suggested land-uses in the proposed assessment model include snowboarding; mountaineering, horseback riding, hunting and watching wildlife; picnic and camping; kite and gliders; rock climbing; visiting ancient monuments, national and cultural traditions; tourism in the seas and large lakes; tourism in inner-waters, hot springs, black tourism; driving in nature; national and ancient works; and desert touring. It should be noted that it is possible to delete or add any new land-use in the structure of the model depending on the new spatial and temporal conditions. Current or potential tourism land-uses which can be evaluated in the study area include snowboarding, climbing and related activities, Kite and Glider station, climbing, Picnic and Camping, and

visiting national-cultural works. Therefore, in the overall tourism assessment model, zero-value was allocated to tourism land-uses in seas and large lakes; hot springs; black tourism; nature driving and desert touring in the study area lacking the minimum capability for tourism assessment. Ultimately, general capability of tourism industry, based on all of the utility layers of the evaluated land-uses, was achieved with consideration of the relevant weights.

In the proposed model, information layers related to the assessment of various tourism land-use capabilities were used directly in the spatial planning. At the same time, in order to make it possible to compare and prioritize the capability of land-use tourism among different regions, extensive and intensive tourism suitability maps, water tourism as well as general tourism capability maps were prepared. In assessing the overall tourism capability, while determining the weight of all evaluated land-uses, the linear combination of these layers was considered. Finally, the average value of the pixels of the overall tourism map was proposed as a benchmark for comparison between the regions. In sum, the proposed tourism model is based on the inductive logic (total evaluation based on details) of two sub-models and a main model (final model). The first sub-model was the assessment of the study area in terms of general tourism standards. The second sub-model is dedicated to assessing the various tourism land-uses based on specific criteria and comparing it with general criteria. In this sub-model, the capability of the area was evaluated in terms of five different tourist land-uses.

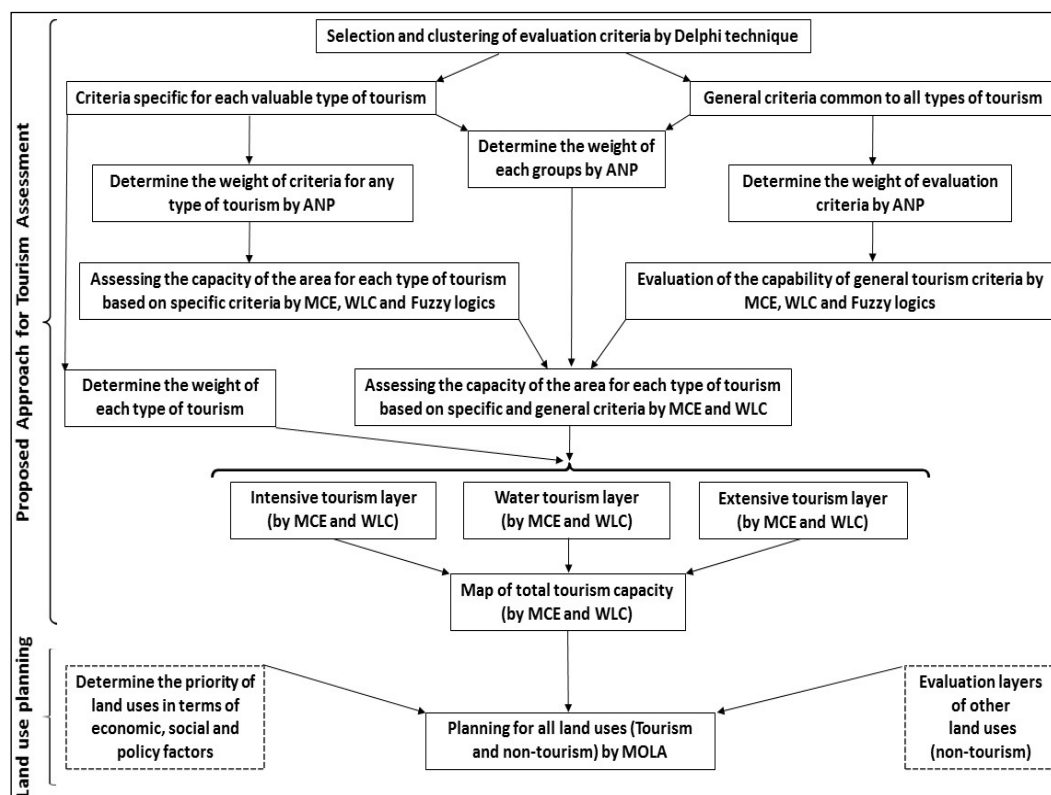


Figure 2. The flowchart of the main steps in the suggested approach for tourism assessment

The final evaluation of the capability of each tourism land-uses requires the determination of the weight of each of the general and specific criteria which was

obtained using the questionnaire in the form of ANP models. In the main model, the tourism suitability was evaluated using desirable layers of land for different uses.

Eventually, three land-use inconsistencies including rock climbing, picnic and camping and snowboarding were used for exploration of MOLA (Multi Objective Land Allocation) compared with other non-tourism land-uses and the final map of the spatial planning was presented. The flowchart of the main steps in the suggested approach for tourism assessment is presented in Figure 2.

FINDINGS

The sub-model of general tourism criteria consists of three socio-economic, aesthetic and climatic criteria. The socioeconomic factors include two sub-criteria of population (number, income and distance) and accessibility parameters. The aesthetic factor also includes two sub-criteria of the beauty of the landscape, the view extension and the climatic factors include the two sub-criteria of the number of sunny days in the visiting season and the average temperature of the visiting season.

Finally, the sub-criteria of accessibility include three sub-criteria of roads, railways and airports, and the sub-criteria of the extent of view include two sub-criteria of depth of vision and vision azimuth. The results of prioritization of the sub-criteria of the general model of tourism are presented in Table 2. For example, Picnic and Camping models were presented among the sub-models of specific criteria. The land-use assessment model, like all other tourist land-uses, is made up of two criteria of general and specific factors. Sub-criteria of general factors have already been discussed in the form of the relevant model.

The criteria for specific factors include soil factors, topography, drinking water, covering, attractiveness of the tourism and local access. Soil factors are subdivided into soil depth, soil texture and bedrock type, the topographic factors are classified into slope and Hillshade sub-criteria, and the drinking water, attractiveness, covering and local access had no sub-criteria. The results of the prioritization of the sub-criteria of the Picnic and Camping model are presented in Table 3. The ANP's main model for assessing the total tourist land-use is composed of three criteria: Water Tourism, Extensive Tourism, and Intensive Tourism. Water tourism includes three sub-criteria of tourism in large waters (large seas and lakes), tourism in small waters (rivers and lakes) and hot water resources. Extensive Tourism includes six sub-criteria of rock climbing, mountain climbing and related uses, kite and gliders, desert touring, nature driving and black tourism, and intensive Tourism includes three sub-criteria of snowboarding, Picnic and Camping, and visiting national monuments and local customs.

The results of the prioritization of the sub-criteria of the main tourism suitability assessment model are presented in Table 4. According to ANP results in prioritizing tourism land-uses (Table 4), the weight of the relevant land-uses for each tourism group was calculated regarding the corresponding group and presented in Table 5. Accordingly, the land desirability layers were prepared for two extensive and intensive groups. The study area lacked the necessary resources for water dependent uses.

The map of the area capability is presented in Figures 2, 3, 4, 5, 6, and 7, respectively, in terms of general tourism criteria and the specific capabilities of skiing, mountain climbing, kite and glider stations, rock climbing and picnic and camping. The capability to visit archaeological, national and cultural monuments was also determined at 178.5 of the total study area. The water tourism suitability unique to the lake of Seymare Dam was determined alongside the study area to be 204. Given that the average value of the pixels for the general criteria layer for water tourism was 79 (weight of 0.4), its final value was 154.

Table 2. The results of prioritizing the sub criteria of the general criteria model

Sub Criteria	Sum	Normal	Ideal	Rank	Sub Criteria	Sum	Normal	Ideal	Rank
LA ¹	0.124	0.316	1	1	Airport	0.028	0.070	0.223	5
DDEPI ²	0.101	0.257	0.813	2	Railway	0.024	0.060	0.191	6
Road	0.039	0.100	0.316	3	AAAT ³	0.024	0.060	0.190	7
Visibility	0.036	0.092	0.292	4	ANSD ⁴	0.018	0.046	0.144	8

1. Landscape Aesthetics; 2. Density, distance and employment of population Index;

3. Average Annual Air Temperature; 4. The Annual Number of Sunny Days

Table 3. The results of prioritizing the sub criteria of the picnic and camping model

Sub Criteria	Sum	Normal	Ideal	Rank	Sub Criteria	Sum	Normal	Ideal	Rank
Attractiveness	0.252	0.473	1	1	Soil Depth	0.020	0.038	0.080	6
Slop	0.065	0.123	0.259	2	Hillshade	0.018	0.033	0.070	7
Quant & qual of water	0.062	0.116	0.246	3	Bedrock material	0.015	0.028	0.060	8
Forest Canopy	0.050	0.093	0.197	4	Soil texture	0.013	0.024	0.050	9
Local access road	0.038	0.071	0.149	5					

Table 4. The prioritization of the sub-criteria of the main tourism suitability assessment model

Tourism Land-uses	Sum	Normal	Ideal	Rank	Tourism Land-uses	Sum	Normal	Ideal	Rank
Picnic and camping	1.0	0.286	0.143	1	Rock climbing	0.183	0.053	0.026	7
visiting ancient and national	0.500	0.143	0.072	2	Kite and gliders	0.156	0.045	0.022	8
Seas and large lakes	0.467	0.134	0.067	3	Driving in nature	0.147	0.042	0.021	9
Mountain-eering	0.423	0.121	0.061	4	Inner-waters	0.102	0.029	0.015	10
Snowboarding	0.202	0.058	0.029	5	Hot springs	0.061	0.018	0.009	11
Desert touring	0.192	0.055	0.027	6	Black tourism	0.060	0.017	0.009	12

Table 5. ANP results on prioritizing tourism activities in the study area

Tourism category	Tourism activities	Weight in category	Weight in total activities	Tourism category	Tourism activities	Weight in category	Weight in total activities
Water tourism	Seas and large lakes	0.740	0.134	Extensive Tourism	Mountaineering	0.363	0.121
	Inner-waters	0.160	0.029		Rock climbing	0.159	0.053
	Hot springs	0.099	0.018		Kite and gliders	0.135	0.045
Sum		1	0.181		Desert touring	0.165	0.055
Intensive Tourism	Snowboarding	0.119	0.058		Driving in nature	0.126	0.042
	Visiting national monuments	0.294	0.143		Black tourism	0.051	0.017
	Picnic and camping	0.587	0.286	Sum		1	0.333
Sum		1	0.487				

The extensive and intensive tourist suitability maps and the total tourism capability and land use planning map of the study area are also shown in Figures 8, 9, 10, and 11, respectively. The average value of the overall map pixels for general capability of tourism was 47. Based on the assessment and planning maps, from 16825 hectares of the studied area, 61.8%, 2%, 4.2%, 4.3% and 4%, respectively, were considered appropriate for climbing and related activities, picnic and camping, Kite and Gliders, rock climbing, and snowboarding.

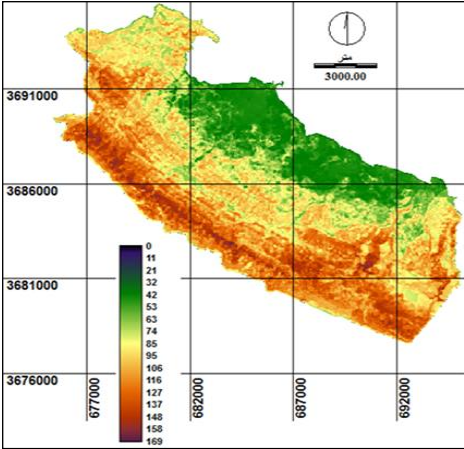


Figure 2. Capability map of the general criteria

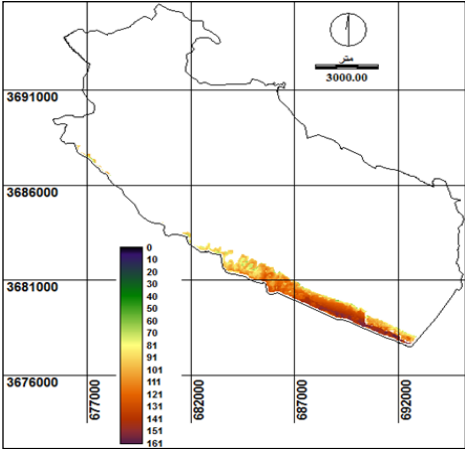


Figure 3. Capability map of the snowboarding station

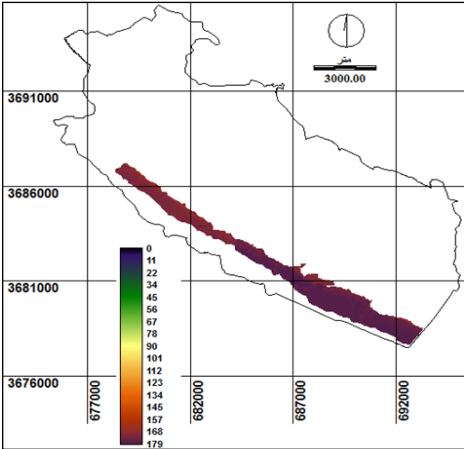


Figure 4. Capability map of the Mountaineering

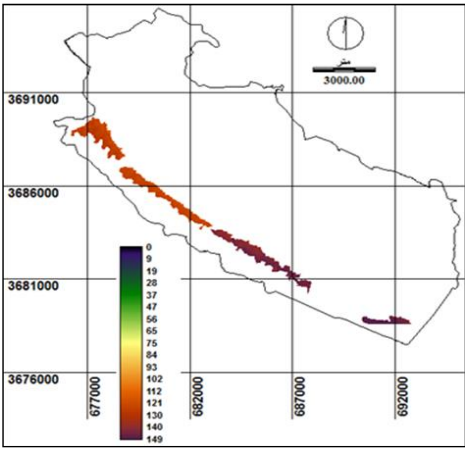


Figure 5. Capability map of the kite or glider station

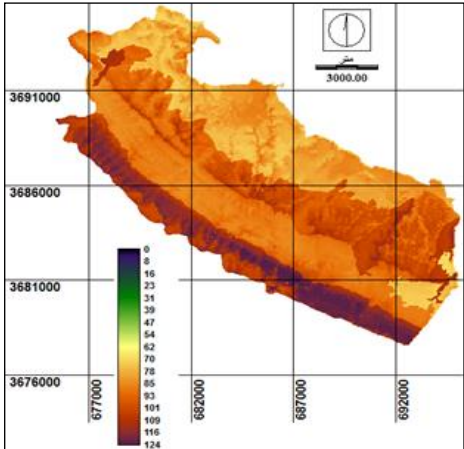


Figure 6. Capability map of the rock climbing

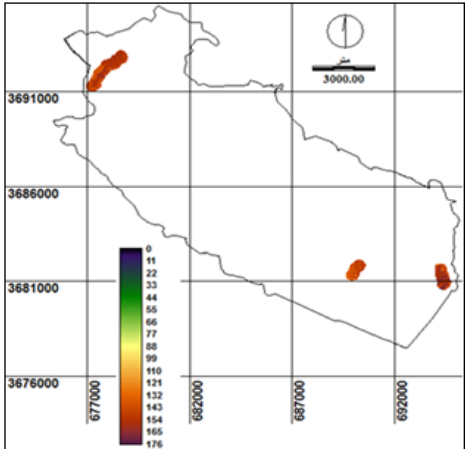


Figure 7. Capability map of the picnic and camping

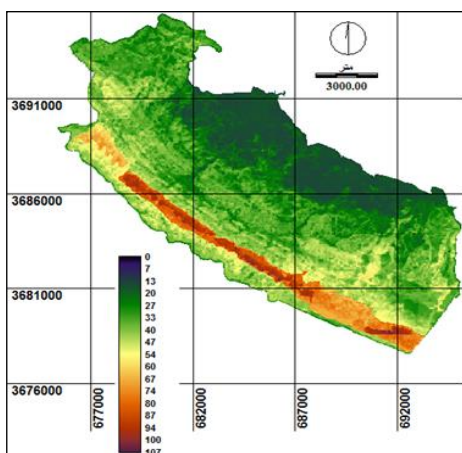


Figure 8. Capability map of the extensive tourism

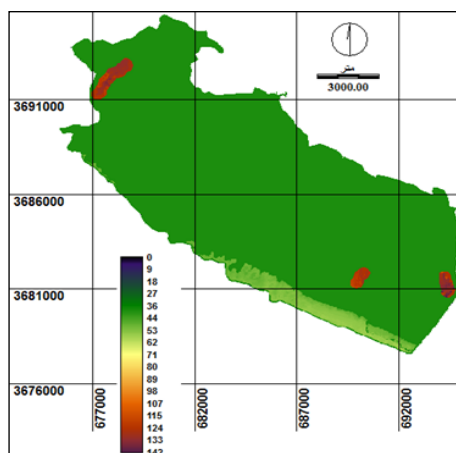


Figure 9. Capability map of the intensive tourism

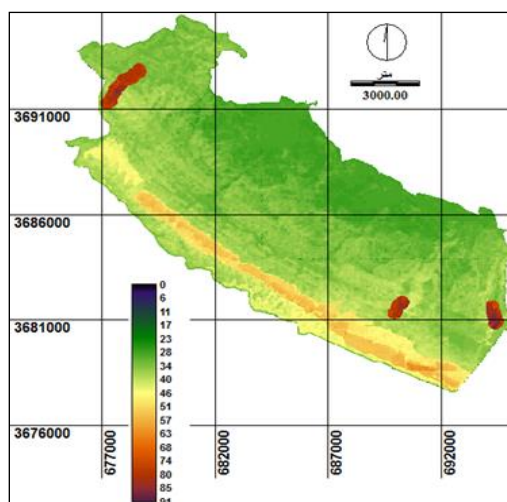


Figure 10. Map of the total tourism potential

DISCUSSION

The methodology for assessing the ecological potential of the land in Iran and the world is based on the inductive logic of moving from the component to whole. As seen in the sources, the tourism assessment model in Iran, based on its categorization, is divided into extensive and intensive areas (Makhdoom, 2006). Obviously, any analysis from the component to whole should be based on the proper clustering of all details about it, while, the clustering of the current tourism model in Iran is incomplete and the most important element of each cluster, which includes various tourism land-uses, along with the criteria for evaluating it are completely ignored. In other words, in the systematic tourism model, many criteria are being studied and mapped out in the preparation of ecological micro units, however, in practice, the optimal use of this information is not used in the evaluation of various tourism land-uses. On the other hand, the desirability of the land for various types of tourism activities is often different and sometimes contradictory.

For example, the desirability of the land for activities such as climbing, snowboarding, water recreation or rock climbing are quite different, and therefore, the correct assessment of the land's real potential for tourism is not possible in the form of extensive and intensive classes. In the systematic approach, the tourism suitability is assessed on the basis of the physical conditions of the region (water condition, edaphic, topography, petrology, tree density, and composition of species plants) in extensive and intensive classes in macro scale. Meanwhile, in the new approach, the overall tourism capability or the ability of extensive and intensive classes were correctly assessed based on the aggregation of the capability of a variety of tourism sub-criteria.

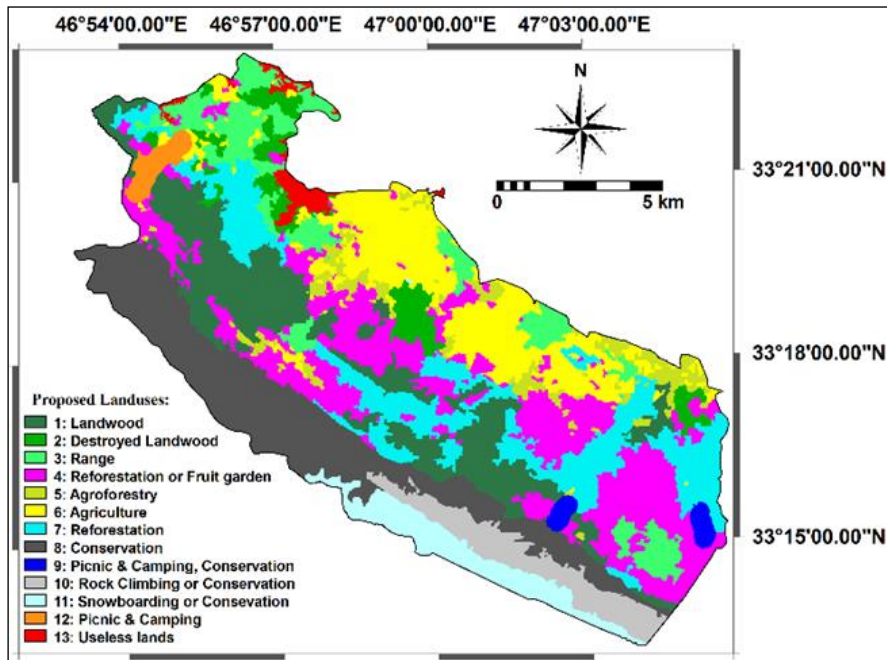


Figure 11. Map of the land use planning

Accordingly, the availability of assessment of tourism suitability for the different types of sub-criteria under assessment is considered as another benefit of the new approach. As noted above, based on the current model in Iran, it is only possible to assess the two types of extensive and intensive tourism in general. Moreover, in the systematic tourism model, there are no references to water tourism, which are of great interest to tourists, and thus, the assessment does not correspond to the type of tourism resources. Based on the proposed approach, tourism classification according to the type of land (dry or water) is more in line with the type of physical structure of the phenomenon and division of land tourism into extensive and intensive areas seems acceptable.

Another advantage of the new approach is to provide an opportunity to assess the capability of all of the tourism sub-criteria in the form of a new proposed model. As noted above, based on the current model in Iran, it is only possible to generally evaluate intensive and extensive tourism. The capabilities of tourism types are highly dependent on various socio-economic factors in the region, and a significant part of these factors can be mapped

accurately based on GIS. Unlike the traditional Iranian tourism model, in the proposed model of this study, these factors were mapped accurately and used in land-use tourism assessment. On the other hand, in this method, contrary to the systematic method, simultaneous application of all ecological criteria along with a significant part of socioeconomic criteria in order to assess the capability and survey of land for different uses is completely provided. In the evaluation approach, the proposed tourism suitability assessment criteria was reviewed in accordance with the new achievements. The use of the Hillshade index instead of aspect (Najafifar et al., 2017) and the use of the combination index of density, distance, and population employment (Najafifar, 2017) are two examples of this type of change. New criteria for land assessment for tourism is not the value of a land limited to a piece of land with the land-use potential.

But, the value of the land must be determined in proportion to the distance from that point. For example, when a lake is of value to tourism, undoubtedly, tourism suitability and the economy and livelihoods of the surrounding areas are affected by the distance from it. In the proposed tourism approach, it is possible to estimate the land value relative to the distance from the tourism phenomenon using GIS. In using the proposed model, if the purpose of assessment is to determine the general tourism capability and it is not important to determine the capability of different tourist land-uses, then the map of all the general criteria of evaluated land-uses can be used in one place to provide a general tourism capability map.

In this research, the average value of pixels belonging to the general tourism map, which was proposed as a benchmark for comparing tourism capabilities between different regions, was found to be 47 in the range of 0 to 255. The reason for the low value of the index was the weakness of socio-economic criteria and the lack of accessibility infrastructure, as well as the lack of capability of certain tourism land-uses in many parts of the study area. The strong impact of the accessibility infrastructure and the conditions for the natural phenomena to be seen has been also emphasized in the final assessment of tourism development capabilities in a study conducted in Canada (Boyd et al., 1995).

CONCLUSION

Providing sustainable assessment of tourism suitability using the cluster structure, consists of available land-use capabilities, based on the use of digital multi-factors, evaluation techniques with fuzzy logic and ANP weighting technique are the benefits of this new approach. managers and evaluators can use this approach to compare the capacity of the regions in terms of three groups of tourism (water, extensive and intensive), and to compare the total tourism land-uses. It is proposed to use this ability to select national strategies of sustainable development in the form of land use planning for assessing large-scale tourism capacity (countries or large provinces).

Although this approach has been presented to assess tourism in Iran, at the same time, considering the innovative approach used in the evaluation method based on the general and specific criteria, use of fuzzy logic in the valuation of criteria, use of the ANP in the prioritization of criteria and land-uses, it is possible to use it in other parts of the world. To use this approach, it is essential to adapt assessment criteria to regional conditions. It should be noted that in each region, the necessary conditions are provided for a limited number of tourism land-uses and consideration of all land-uses in the calculation of the index is for the purpose of make it possible to compare different regions in terms of total tourism capability in large-scale area.

REFERENCES

- Ahmadi Sani, N., Babaie Kafaky, S., Pukkala, T., & Mataji, A. (2016). Integrated use of GIS, remote sensing and multi-criteria decision analysis to assess ecological land suitability in multi-functional forestry. *Journal of Forestry Research*, 27(5), 1127–1135.
- Amanpour, S., Mohammadi, A., & Naser, M. (2012). Ranking of cities of Khozestan province from the view of tourism criterions using TOPSIS model. *Journal of Human Geography*, 5(1): 201–221.
- Asadi, R., & Daryaei, M. (2011). Prioritization of Forms of Tourism in Iran to Formulate National Strategies. *European Journal of Scientific Research*, 5(1): 144-152.
- Asami, S., Yoda, M., Kino, A., & Morishige, M., (2009). Tourism Relationship Model and Intermediary for Sustainable Tourism Management: Case Study of the Kiritappu Wetland, Hokkaido, Trust in Hamanaka. BEST EN Think Tank IX. 382-394p.
- Berry, J.K. (1991) "GIS in Island Resource Planning: A Case Study in Map Analysis". In: Maguire, D. et al. (eds) *Geographical Information Systems: Volume 2 Applications* (pp. 285-95), Harlow, Longman.
- Boyd, S.W & Butler, R.W. (1996), Seeing the forest through the trees: Using GIS to identify potential ecotourism sites in Northern Ontario, in: L.C. Harrison & W. Husbands (Eds) *Practising responsible. Tourism: International case studies in tourism planning, policy & development*, pp. 380–403 (New York: J. Wiley & Sons).
- Boyd, S.W., Butler, R.W., & Haider, W. (1995). Identifying criteria and establishing parameters for forest-based ecotourism in Northern Ontario, Canada. In: Vander Stoep, Gail A., ed. *Proceedings of the 1994 Northeastern Recreation Research Symposium; 1994 April 10-12; Saratoga Springs, NY: Gen. Tech.*
- Boyd, S., Butler, R.W., & Haider, W. (1995). Identifying criteria and establishing parameters for forest-based ecotourism in Northern Ontario, Canada. In: Vander Stoep, Gail A., ed. *Proceedings of the 1994 Northeastern Recreation Research Symposium; 1994 April 10-12; Saratoga Springs, NY: Gen. Tech.*
- Cocklin, C., Harte, M., & Hay, J. (1990). Resource assessment for recreation and tourism: a New Zealand example. *Landscape and urban planning*, 19(3), 291-303.
- Cohen, S., Prayag, G., & Moital, M. (2014). Consumer behavior in tourism: Concepts, influences and opportunities. *Journal Current Issues in Tourism*, 17(10): 872-909.
- Dezsi, Șt. (2008). Value estimation of tourism potential and material base in Lăpușului Land in the perspective of regional tourist arrangements, *GeoJournal of Tourism and Geosites*, year 1, no. 1, vol. 1, pg. 48-62.
- Dowling, R.K. (1993). An environmentally based approach to tourism planning. Doctoral Thesis, School of biological an environmental sciences, Murdoch University, Murdoch. 393p.
- Eskandari, S., Oladi Ghadikolaei, J., & Yakhkeshi, A. (2013). Evaluation of Tourism Attract Potential of Sorkhehesar Forest Park Using Systemic Analysis Method. *Ecology of Iranian Forest*. 1 (1): 60-71. (In Persian).
- Ferrario, F.F. (1979). The evaluation of tourist resources:an applied methodology. *Journal of Travel Research*, 17(3): 18–22.
- Ghadiri Masoom, M., Salmani, M., & Ghassabi, M.J. (2015). Evaluating of Development Potential of Desert Tourism and Its Impact on Socio-economic and Physical Dimension in Rural Settlements (Case Study: Villages of Khor-o-Biabanak Township). *Journal of Geography and Planning*, 50 (18): 281-304. (In Persian).
- Glavan, V. (2000). Tourism and environment protection—previous problems, *Romanian Statistics Revue*, no. 8-9, Bucharest.
- Iatu, C. (2010). A critical analysis on the evaluation of tourism attractiveness in Romania. Case study: the region of Moldavia. The 5th WSEAS International conference on economy and management transformation, Volume I. West University of Timisoara, Timisoara, Romania.
- Ielenicz, M., & Comănescu, Laura (2009), *Romania tourist potential*, University Publishing House, Bucharest. 464p.
- Jokar, P., Masoudi, M., Fallah Shamsi, S-R., & Afzali, S-F. (2014). Developing a Model for Ecological Capability Evaluation of Ecotourism. *International Journal of Scientific Research in Environmental Sciences*, 3(1): 1-8.
- Karami, O., Maleknia, R., & Piran, H. (2014). An integrated GIS-based analytic network process to land suitability evaluation for forest park location, case study: Badreh country, Ilam, Iran. *Advances in Environmental Biology*. 8(2): 342-350.
- Lin, L.Z., & Hsu, Th.O. (2011). Designing a model of FANP in brand image decision- making, *Applied Soft Computing*, 11: 561–573.
- Litton, J.B., (1968). Forest landscape description and inventories basis for land planning and design. US Dep Agric. Forest Service Research Paper, Berkeley. 64p.
- Lynch, J.A., & Gimblett, R.H., (1992). Perceptual values in the cultural landscape: A computer model for assessing and mapping perceived mystery in rural environments. *Comput, Environ, and urban systems*, 16, 453-471.
- Makhdoom, M. (2006). Fundamental of land use planning. 7th edition. Tehran University, 289p. (In Persian).
- Marzuki, A. (2011). Resident Attitudes towards Impacts from Tourism Development in Langkawi Islands, Malaysia. *World Applied Sciences Journal*, 12: 25-34.
- McClinchey, A.K., & Carmichael, A.B., (2010). Countryside capital, changing rural landscapes and rural tourism implications in Mennonite Country. *Journal of Rural and Community Development*, 5, 178-199.

- McHarg, Ian. (1969). *Design with Nature*. American Museum of Natural History. 197p.
- Mitchell, B. (1989). *Geography and resource analysis*. New York: Longman Scientific and Technical; 2nd edition. 386p.
- Muntele, I., & Iatu, C., (2006). *Tourism geography-Concepts, methods, spatial patterns*. Sedcom Libris, Iași.
- Moss, R. M., & Nickling, W. G. (1980). Landscape evaluation in environmental assessment and land use planning. *Environmental Management*, 4(1), 57–72.
- Movahedi, S., Amani, H., & Banikamali, S. (2013). Identification and calculation of tolerance capacity areas prone to ecotourism development in Sabalan Zone. *Geography and Environmental Planning Journal*, 49(1): 35-38.
- Najafifar, A., (2017). Presentation of comprehensive model of land use planning for multiple uses in southern Zagros woodlands (Case study, Ilam Province, Badreh Township, Kabirkoooh). A thesis for the degree of PhD in Silviculture and Forest Ecology. Gorgan University of Agricultural Sciences and Natural Resources. 326p.
- Najafifar, A., Moayeri, M.H., Shatai-Joybari, Sh & Salman-Mahini, A., (2017). The role of hillshade regime on canopy density and evaluation of ecological capability in the Zagros woodlands (Case study: Kabirkoooh forest of Badreh city, Ilam province). *Iranian Journal of Forest and Poplar Research*, Vol. 25 (1): 23-34.
- Nakos, G. (1984). The land resource survey of Greece: a tool for land use planning and policy, in "policy Analysis for Forestry Development". *Proc IUFRO-Div. 4. Thesdaloniki*: 439-450.
- Nasrollahi, Z., Jahanbazi, N., & Naseri, T. (2014). Classification provinces in the country in terms of tourism gravity. *Journal of Tourism Management*, 7(3): 17-38. (In Persian).
- Schwab, K. (2017). The Travel & Tourism Competitiveness Report 2017, Paving the way for a more sustainable and inclusive future. *World Economic Forum*.
- O'Riordan, T. (1971). *Perspectives on Resource Management*. London, Pion. 183 p.
- Pirmohammadi, Z., Feghhi, j., Zahedi Amiri, G., & Sharifi, M. (2010). Environmental capability evaluation appropriate to ecotourism in Zagros forests (Case study: Saman-e-orfie Cham-Haji of Kakareza forest in Lorestan Province). 18(2): 230–241.
- Priskin, J. (2001). Assessment of natural resources for nature-baased tourism:in case of the central Coast Region of Western Australia. *Journal of Tourism Management*, 22, 637-648.
- Ringo Linder, G. (2009). Utilizing GIS-Based Site Selection Analysis for Potential Customer Segmentation and Location Suitability Modeling to Determine a Suitable Location to Establish a Dunn Bros Coffee Franchise in the Twin Cities Metro, Minnesota, Volume 11. *Papers in Resource Analysis*. 11 pp.
- Saaty, T.L. (1999). *Fundamentals of the Analytic Network Process*. Proceedings of ISAHP (1999), Kobe, Japan. August 12-14. 14p.
- Smith, R. S. (1982). The use of land classification in resours assessment and rural planning. *Natural Environment Research Council Institute of Terrestrial Ecology*. Cambridge. 44p.
- Smith, S. (1987). Regional analysis of tourism resources. *Annals of Tourism Research*, 14(2): p 254-273.
- Song, M.W; Liang, Y.F; & Feng D. (2014). Research on the Evaluation Model of Urban Tourism Management Efficiency with Uncertain Linguistic Information. *Journal of Control Science and Engineering*, (2014): 1-4.
- Suvdantsetseg, B., Fukui,H., & Oe, M. (2011). Evaluation of ecotourism resources through participatory Geo-Spatial Approach: A Case of the Biger city, Mongolia. *SEAN Journal on Hospitality & Tourism*, Vol 10(2). 162-176.
- Suvdantsetseg, B., Fukui,H., & Tsolmon, R. (2010). Ecotourism development planning in the Biger soum of Gobi-Altai province, Mongolia, paper published at the 4thAnnual International Conference on the Application and Development of Geospatial Technologies in Mongolia, 153-158.
- Tsaur, S.H., Lin,Y.C., & Lin, J.H., (2006). Evaluating ecotourism sustainability from the integrated perspective of resource, community and tourism. *Journal of Tourism Management*, 27, 640-653.
- Yildirim, T.B., AK, T., & Olmez, Z. (2008). Assessment of the natural-ultural resources in Canakkale for nature-based tourism. *Environ Dev Sustain*, 0:871–881.
- Zabardast, E. (2010). The application of Analytic Network Process (ANP) in urban and regional planning. *Journal of Fine Arts, Architecture and Urban Planning*, Tehran University. 41: 79-90. (In Persian).
- *** UNWTO (United Nations World Tourism Organization). (2017). *Tourism Highlights 2017 Edition*. <http://www.e-unwto.org/doi/book/10.18111/9789284419029>. 15p.

Submitted:
08.04.2018

Revised:
23.09.2019

Accepted and published online
25.09.2019

STRATEGIC PLANNING OF SPORT TOURISM EVENTS ON DESTINATION BRANDS: EXAMINING THE ROLE OF HOME-GROWN SPORT

Janice HEMMONSBY

University of Johannesburg, School of Tourism and Hospitality,
College of Business and Economics, South Africa, e-mail: janicehemmonsbey@yahoo.com

Tembi M. TICHAAWA*

University of Johannesburg, School of Tourism and Hospitality,
College of Business and Economics, South Africa, e-mail: tembit@uj.ac.za

Citation: Hemmonsby, J. & Tichaawa, T.M. (2019). STRATEGIC PLANNING OF SPORT TOURISM EVENTS ON DESTINATION BRANDS: EXAMINING THE ROLE OF HOME-GROWN SPORT. *GeoJournal of Tourism and Geosites*, 26(3), 794–807. <https://doi.org/10.30892/gtg.26310-398>

Abstract: This paper discusses the home-grown sport with a regular occurrence as equal opportunities for strategic planning. This study employed a qualitative research design which featured in-depth, semi-structured interviews with key industry stakeholders involved in sport event and tourism and destination branding organisations. A thematic analysis of the results revealed the imperative of events of the home-grown nature to contribute to the continued benefits relating to tourism and destination branding. The results further revealed the importance of including other tourism and destination branding offerings as part of the strategic planning and implementation of destination branding which consequently lengthen visitor stays. Moreover, stakeholders emphasised the importance of strategic planning through leveraging activities that underpin authentic destination brand awareness. The results of this paper add significant contributions to destination branding theory by investigating the role of sport for destination brand development. This paper further contributes to stakeholder policy and practice through its empirical findings that outline stakeholder views and strategies of planning home-grown events for brand-related benefits.

Key words: Strategic planning, home-grown events, sport tourism, South Africa, destination brand development

* * * * *

INTRODUCTION

Over the years, destination branding research has placed a particular focus on the role of branding in relation to the consumption of tourism destinations brands (Pike 2009; Jago et al., 2010; Chen & Funk, 2010; Baker, 2012). Such studies have shown

* Corresponding author

that the sport events industry is one of the biggest industries that serve as a catalyst for branding opportunities in which destinations can revel in the benefits of tourism. However, the globalisation of sport, together with the globalisation of mass media, has intensified the marketing pressures on tourism destinations to not only promote their brands through an association with sport, but has further advanced the competition among destinations to share in the domestic and international tourism markets that accompany sport events (Weed & Bull, 2009; Gibson & Lamont, 2018).

To withstand the advanced competition resulting from globalisation, destinations have become increasingly strategic in their approach to branding where they adopt particular tactics to gain a competitive advantage over other destinations.

Such tactics are generally linked to sport event leveraging through which stakeholders recognise events as opportunities to engage in strategic planning to achieve desired long-term impacts (Chalip, 2002). From a theoretical perspective, the current international literature discusses a number of cases where nations have successfully employed leveraging strategies towards achieving tourism destination brands through sport mega-events such as the Olympic Games and the Federation Internationalé de Football (FIFA) World Cup tournaments (Chalip, 2002; Chalip & O'Brien, 2008; Grix, 2012; Karadakis & Kaplanidou, 2012; Swart & Bob, 2012; Knott, Fyall & Jones, 2017; Tichaawa & Bob, 2015; Ziakas, 2018). As a result of the global nature of sport mega-events in relation to participation, awareness, and media coverage, it is no surprise that such events provide significant opportunities for branding and or leveraging. Notwithstanding the opportunities that can be derived from mega-events, Chalip (2004), Ziakas (2018) and Ziakas and Costa (2011) strongly advocate the importance of an event portfolio consisting of home-grown, recurring events as part of the destination marketing strategy that will allow destinations to optimise the reach and frequency of target markets when leveraging home-grown events over the once-off mega-event. However, due to the scant theory to inform strategic planning of home-grown events that reinforce the associated branding opportunities, stakeholder effort to strategically plan around home-grown events to achieve brand-related benefits might go unrealised and hence the focus of this current research.

Moreover, part of the sport event leveraging theory, according to Chalip (2004) and Hemmonsbey, Tichaawa and Knott (2018) illustrate the need for establishing strategic objectives which essentially aim to derive desired means for destination branding benefits. Even though these strategic objectives are realised in both developed and developing contexts, it still remains unclear how such objectives are incorporated in practice by developing nations where the priorities of such nations are skewed towards more pressing socio-economic issues (Hemmonsbey & Knott, 2016; Hemmonsbey & Tichaawa, 2019). In this paper, South Africa is used as a destination brand case study to provide insights into a developing destination context.

This was achieved by way of exploring the stakeholder views on the strategic planning of home-grown events to inform policy and practice. The article begins by offering an account of the destination branding discourse. This is followed by a contextualisation of sport tourism events by introducing home-grown events. Current debates around strategic planning through sport event leveraging are espoused.

Since South Africa is the chosen case study, we present an overview of the country as a sport destination. Findings from a series of interviews with various stakeholders to examine the main study objective are presented. We conclude that results and discussions of this paper revealed a significant contribution of home-grown sport events to establishing value propositions for destination brand positioning.

THE DESTINATION BRANDING DISCOURSE

The concept of destination branding originated from the general branding literature and therefore has often been viewed as running parallel to the corporate, product and service branding theories (Balakrishnan, 2009). However, while it is on the premise of generic branding that destination branding is generally understood, destination branding often only indicates the modern form of tourism promotion (Anholt, 2005; Hanna & Rowley, 2008; Boisen et al., 2018).

A widely recognised definition that builds on the premise of the generic branding theory towards the promotion of travel and tourism thus describe destination branding according to its unique and identifiable characteristics in its name, logo, and any other word or graphic; as well as the promise of delivering a memorable travel experience that is typically linked to unique associations of the destination (Ritchie & Ritchie, 1998). More recent studies additionally argue that, destinations not only create memorable travel experiences for the benefit of unique associations, but they also seek to position their brands in such a way that the visitors' experiences of a destination will bring about repeat visits as well as create voluntary ambassadors for the destination (Morgan et al., 2010). For this reason, destinations increasingly view branding as a more strategic tool towards brand positioning (Filo et al., 2013).

Furthermore, Greaves and Skinner (2010) postulate that to develop a unique brand identity for tourism destinations will help the actual and potential tourists to differentiate a particular tourism destination from another destination. In line with this statement, Kapferer (2012) argues that it is of utmost importance for a place brand to possess a clear value proposition that constitutes the brand identity, so as to facilitate the derivation of the related benefits. Sport (events) are globally viewed as being powerful value propositions for positioning place brand identities, for the attaining of various branding benefits (Govers & Go, 2009; Zhang & Zhao, 2009; Hemmonsby & Knott, 2016). Melbourne, in Australia, remains one of the prime examples of a city that has positioned itself as one of the leading destination brands globally, due to its brand identity (logo), which showcases sport as one of its portfolios.

Elsewhere, the findings of Hemmonsby and Knott (2016) reveal that Cape Town in South Africa has recently redeveloped its identity (in the form of its logo and slogan) with [sport] events being one of its investment and marketing strategies. These views and examples are consistent with Morgan et al. (2010) in that, tourism destinations should create a niche market and clearly distinguish a destination from other competing destinations in the face of globalisation. Such destinations can range from cities, towns, villages, nations (Camilleri, 2019). From the above discussion, it is clear that the wider context of destination branding extends towards brand differentiation applications to not only achieve brand awareness but also to achieve brand positioning.

Moreover, beyond just establishing a clear brand identity, destinations should look towards including a value proposition in the form of a special niche area which will subsequently benefit and sustain the tourism destination brand. For this paper, sport events will be explored as a tourism niche that are strategically planned and capitalised in order to derive tourism and destination branding outcomes.

SPORT EVENTS AS A MEANS FOR STRATEGIC DESTINATION BRANDING

The nature of sport events generally presents opportunities for host destinations to engage in branding practices which subsequently permit destinations to augment their brand awareness as well as communicate positive messages about the destination to the

rest of the world. Likewise, opportunities for economic and social development are presented through sport event hosting. Further opportunities for strategic planning through stakeholder coordination of event leveraging are implied to achieve long-term destination branding benefits. As a consequence to their large-scale and international hosting nature, sport mega-events such as the Olympic Games and the FIFA World Cup have particularly proven to be an important feature in positioning nations to the international, or global, society (Horne & Manzenreiter, 2006).

Mega-events have further proven to hold major legacy implications which can either be negative or positive, planned or unplanned, and tangible or intangible for the host and non-hosting community (Swart & Bob, 2012; Nauright, 2013; Kim et al., 2015; Lui, 2016). Such legacies are associated with sporting, urban, infrastructural, economic, environmental, political and societal impacts (Cornelissen et al., 2011).

For example, the 2004 Olympic Games presented unique opportunities for Athens and Greece to diversify and enrich their destination's tourism product and their successful organisation of the Olympic Games has left valuable tangible and intangible legacies for Athens linked to its heritage and tourism infrastructure (Ziakas & Boukas, 2014). Elsewhere, the 2008 Olympic Games brought a number of legacies to Beijing and the rest of China. These included social legacies comprising public health, education and volunteerism; and urban and environmental legacies involving its road and transportation infrastructure development, cultural/heritage preservation, environmental awareness, and venues/facilities upgrades (International Olympics Committee, 2009). Another example can be seen from the 2010 FIFA World Cup in South Africa, with an adoption of an African Legacy Programme with intent to maximise impacts of the World Cup for the broader African continent (Tichaawa & Bob, 2015).

However, while the effects of sport on destinations are apparent in the legacy impacts after the staging of events, Tichaawa and Bob (2015) advocate that authorities must strategically plan for long-term impacts and not assume or anticipate such impacts to materialise. In the example of Athens, Ziakas and Boukas (2014) note that, despite of the success in organisation of the Olympic Games, there was an evident lack of coordination between commercial providers and public governing bodies towards a joint strategic approach to leverage the Games. For this reason, the aspiration to harness the post-Olympic facilities went unrealised. A forward-thinking theory is therefore presented by Chalip (2017), who suggests that the quality of impacts derived from sport mega-event hosting depends on a coordinated approach to event leveraging (which is discussed later in the paper). This advanced approach can either be a further challenge faced by host and non-host nations or, if effectively implemented, can maximise the potential for positive, long-term benefits (legacies), while minimising the potential risks to tourism and destination branding. Notwithstanding the abovementioned notions on the impact of mega-events towards destination branding, it is worth noting here that, there are limited mega-events that exist which leads to fierce competition among destinations in bidding to host such events.

Consequently, the degree to which the full extent of impacts are realised is limited to selected hosting nations. For this reason, the home-grown event is introduced to afford a wide-range of destinations with an equal opportunity for a share of the world's tourism market and subsequently derive its intended brand related benefits.

Hemmonsby and Tichaawa (2018) describe home-grown events as recurring events that are smaller in size and scope compared to the mega-event but have a strong association with the destination's brand identity. Such events are further distinguished by their mass (local and international) participation and their innate characteristics in terms

of their actual staging by using an outdoor, natural setting. Home-grown events are assumed to be conceptualised, produced, and nurtured by a particular locale. According to Brown, Chalip, Jago and Mules (2004) destinations strategically use events of this nature to strengthen its existing brand image as the associations of the event is consistent with one or more aspects of the destination. Therefore destinations benefit by choosing events that highlight for example, its beaches, landscape, or climate such as Cycle Tours, water sports, triathlons, and mountain bike races amongst other sports.

It is clear that events take various shapes and sizes and, depending on the destination aims, stakeholders may include either one or more type of events in their strategic planning to achieve tourism destination benefits. In fact, Chalip (2004), Ziakas and Costa (2011) and Ziakas (2018) encourage destinations to include an event portfolio consisting of more than one event in their strategic initiatives. In light of this view and in relation to the home-grown event theme, this study contextualises the home-grown event for destinations as part of their strategic planning and overall leveraging practices.

STRATEGIC PLANNING THROUGH SPORT EVENTS LEVERAGING

Essentially, strategic planning serves as the basis for leveraging in its approach to recognise events as an opportunity for designing and implementing strategies and tactics to achieve desired impacts. Earlier studies that delve in to the strategic planning of sport events argue the importance of assessing planned strategies pre-and post-event hosting (Cooper 1995; Bramwell, 1997). Advanced research on leveraging agrees with this view by referring to leveraging as a strategic ex-ante, analytical approach as opposed to an ex-post, impact-driven, outcomes approach (O'Brien & Chalip, 2008; Smith 2014). Therefore, both planning techniques aim to produce 'forward thinking ... strategic approach', in terms of which both the impacts and the ways of achieving them are planned prior to an event (Smith, 2014). Also, strategic planning through leveraging advocates for the need to formulate strategic objectives that work towards an overall goal. Given the clear set of strategic objectives as a result of strategic planning, it is argued that stakeholders involved can take ownership of their selected objectives and approach. However, there is still a need to define the roles and responsibilities of stakeholders in the collaboration of stakeholder groups towards optimal leveraging (Hemmonsby & Tichaawa, 2018).

Despite the issue of stakeholder collaboration, the case study of sport event leveraging for Australia and the 2000 Olympic Games provides best practices of stakeholder collaboration pre- and post-event hosting. In an attempt to strategically position Australia as a leading destination for sport tourism, stakeholders representing both public and private institutions merged their efforts and objectives in pursuit of a greater goal. Stakeholders' leveraging efforts have moreover allowed this nation to capitalise the Olympic media around their brand image which essentially lead to stakeholders influencing respective journalist stories in respect to their destination brand.

In a different case where destination brand image was the impetus for strategic planning, Grix (2012) reported on Germany's attempts to engage in sport event leveraging to improve their nation's (poor) image abroad. This finding came as a result of international perceptions labelling the people as 'dominant', 'arrogant', and 'dull', as well as the Second World War and Nazi perceptions still remaining, especially in the British press (Grix & Lacroix, 2006). These two examples thus contradict the earlier reference to Athens and their unsuccessful attempts to coordinate stakeholder efforts towards a joint strategic approach to leveraging the 2004 Olympic Games.

The discussion on strategic planning through sport event leveraging places a clear emphasis on the deliberate design and implementation of marketing strategies, the

formulation of strategic objectives, as well as the establishment of stakeholder partnerships. From a practice perspective, case studies show that an engagement with global media networks in relation to the host destinations' image, product and service offering coherently positions tourism destination brands such that long-term positive perceptions are formed. Consequently, these strategic planning approaches are explored in the context of developing destinations by means of hosting annual, recurring events.

THE RESEARCH STUDY

The present study employed a qualitative research approach wherein in-depth face-to-face, semi-structured interviews were conducted with key industry stakeholders in sport, destination, and tourism branding organisations. Marshall and Rossman (2006) verify that a study focusing on the individuals' lived experience, much like the present study, typically relies on adopting an in-depth interview strategy. Key informants that participated in this study were purposefully selected by virtue of their experience and or background into the study scope and context. It was important to include a wide range of stakeholders representing both public- and private organisations within the spheres of national and local departments. More specifically, stakeholders in top management positions within national and local government representing the Department of National Tourism and the Department of Sport and Recreation were deemed critical as they support home-grown events and assist in setting strategic objectives as it applies to national and local imperatives. Moreover, directors and chief operators of private sport event companies involved in marketing and staging home-grown events were deemed critical for their role in applying leveraging strategies around the hosting of their events. Another group of stakeholders were key informants in the tourism operating industry due to their knowledge and insights into the tourists' experience during the hosting of sport events. The given sample of 24 is justified for the current study as, with qualitative research, the sample size in relation to interviews are based on the feasibility of the researcher as well as the level of saturation reached from the data collected.

Each interview was conducted at the workplace of the respondents and the interviews lasted approximately 45-60 minutes. The semi-structured interviews were guided by a set of questions relating to the topics identified through the literature review, although the interview protocol consisted of open-ended questions that allowed the interviewer to probe, or clarify, the issues raised, and to explore the particular areas of experience, or expertise, of the respondents involved. The interview questions largely focussed on the strategic planning of home-grown sport in relation to destination branding. In order to solicit stakeholder views on their understanding of strategic planning of home-grown events, specific questions on sport event leveraging in the context of home-grown events were posed. The interviews were digitally recorded and manually transcribed verbatim. Data was displayed, reduced and inductively coded by means of a software programme, Atlas. ti. Subsequent to developing the list of codes, themes were created and grouped which form the basis of the discussion section presented below. Ethical considerations were followed in that all the interviews were conducted with the prior consent of the respondents concerned. The respondents could at any time opt-out of the interview. Every effort was made to ensure the validity and reliability of the data, by means of constantly checking the interview transcripts, as well as continuously comparing them to the interview voice recordings and field notes made during the interview. To maintain anonymity, respondents are indicated by an 'R' and are assigned a number (1, 2, 3...) which bear no relevance to their responses. Quotations are presented to illustrate practical examples or emphasise a common response.

Justification of South Africa as case study area

As one of the most developed countries on the African continent, South Africa has provided a good example of a developing destination host of large-scale sport mega-events in the hope of promoting tourism and economic development. In previous years the country bid to host an array of sport mega-events, such as the 1995 Rugby World Cup, the 2003 Cricket World Cup, and the 2010 FIFA World Cup, all of which were capable of arousing global awareness, and of having an international impact. While the Olympic Games have yet to be hosted in South Africa, the unsuccessful Cape Town bid made for the 2004 Olympic Games, as well as the Durban bid made for the 2020 Games, has made South Africa a representative nation on the African continent for the hosting of the entire array of world spectacles Giampiccoli, Lee & Nauright (2015).

South Africa further consistently host many successful recurring, small-scale sport events where the control over the organising, marketing and staging of such events are retained locally. For example, both Cape Town City and Durban have recognised that major annual events have become a trademark to their existing brand and that a substantial number of tourists have come to visit the city specifically for the purpose of attending, or of participating in, sport-related events (Turco et al., 2003; Maharaj et al., 2006; Hemmonsbeey & Knott, 2016). Despite such events having significantly gained increasing (national and international) participation, spectating and media coverage, Kotze (2006) argues that not enough is being done to strategically engage with such events for tourism promotion, internationally. Thus, in spite of their prominence in terms of home-grown event hosting, South Africa has yet to pursue brand positioning through sport event leveraging for the attainment of destination branding benefits. The current study, consequently, delves into assessing stakeholder strategies for leveraging small-scale sport events for destination branding purposes and addresses the gap in practice by providing recommendations for the leveraging of small-scale events within the developing South African context.

RESULTS AND DISCUSSION

Destination branding contextualised through the value proposition of sport

Respondents consistently described destination branding similar to the definition that is widely accepted in the literature; as a modern form of tourism promotion (Anholt, 2005; Boisen et al., 2018; Hanna & Rowley, 2008). Respondents further alluded to the importance of destination branding strategies to create a distinctive brand identity as well as to establish brand positioning that will not only “attract captive markets” (R3), but also “retain current tourism markets” (R3). These views are thus shared with the sentiments of Morgan et al. (2010), Greaves and Skinner (2010) and Filo et al. (2013) on the practices of strategic destination branding. Ways in which destinations can implement strategic marketing initiatives are set out by a key informant of sport event hosting in their description of destination branding;

I see destination branding as an opportunity to take the key elements and their strong points, whether it be natural beauty or its manmade beauty, and strategically market it so that people [tourists] will come and visit South Africa (R8).

Interestingly, in relation to the South African destination brand, respondents consistently agreed that, although South Africa has a clear global brand identity, individual South African cities still own their individual brand identities which might, at times, not reflect the overall nationwide brand. For example, (R1), (R2) and (R5) noted that coastal cities such as Cape Town and Durban typically share similar brands in terms of its natural

setting as well as their sport event hosting as also supported by (Turco, et al., 2003; Maharaj et al., 2006; Hemmonsby & Knott, 2016), whereas other inland cities such as Johannesburg and Tshwane are commonly viewed as a “business hub with a corporate brand identity” (R5). Due to such views, the destination brand identity of South Africa is usually perceived as a ‘diverse place brand’ (R8). In light of such findings, Kapferer (2012) argues that destinations need to establish a value proposition that is promised to be delivered to visitors of a destination. This study’s findings, together with findings of other empirical studies such as Govers and Go (2009) and Zhang and Zhao (2009) show that sport events are significantly considered as an ideal value proposition for strategic brand positioning. However, as such studies refer to the sport mega-event, it usually isolates such events as the sole proposition in relation to the destinations’ marketing arms. Whereas the current study zooms in to home-grown events, discussions from respondents reveal the interrelated of home-grown sport together with other tourism products and services, such as the natural setting and destination attractions, and viewed that, although it is important to establish a niche sport market “as people consistently travel for sport” (R4), a shared value proposition that appeals to both sport and leisure tourism markets are important to stimulate tourism in the long-haul. In reference to the strategic planning of home-grown sport events for destination branding, while illustrating value propositions of Cape Town, South Africa’s brand, a key informant national department of tourism posited that;

It (i.e. destination branding) is like a demonstration of the product. You have these great images of the country, but you only see and experience it when someone is participating in an event in a particular destination, showcasing the destination images like Table Mountain, or swimming across the ocean to Robben Island in Cape Town. So, that is what needs to happen, the leveraging of sport [with other tourism products] (R8).

For such reasons mentioned above, home-grown events should then be strategically planned to incorporate cross-leveraging and marketing activities with other tourism amenities and attractions to ensure not only a consistent brand message for South Africa across a variety of tourism niche markets, but also to encourage equal economic impacts for the host destination long after the event has passed. While such perceptions exist, there was no mention of the practical application of such strategic marketing plans for South Africa.

Opportunities for strategic planning through home-grown sport events

Due to the incipient concept of home-grown events in the literature, respondents were asked about their understanding of this concept. Hemmonsby and Tichaawa (2019: 259) present a list of major events in South Africa which encompass a variety of sporting disciplines, from cycle tours, marathon events, golf events, water sport and multi-disciplined events including triathlons. While some of the respondents of the present study were not overly familiar with the home-grown concept, other responses typically exemplified an understanding of home-grown events in view of the aforementioned major events. Notwithstanding the relative confusion about the ‘home-grown’ concept, (R1), (R3), (R5), (R11) and (R12) consistently described home-grown events according to their “iconic” status, which ties in with the interpretation of Getz, Svensson, Peterssen & Gunnervall. (2012) on the ‘hallmark’ and ‘sport mega-event’ concepts. However, in contrast to the mega-event, the home-grown event is seen to be conceptualised, initiated and organised locally with an opportunity to grow internationally and moreover has the ‘ability to contribute to some kind of destination branding’ (R1) from beyond the national borders concerned. A response that demonstrates an iconic home-grown sport events in Cape Town reads as follows;

[The] Two Oceans Marathon event was started locally in 1977/78, and [it] has become an iconic event, which has grown internationally. Similarly, the Cape Town Cycle Tour, formally known as the Pick n Pay Argus [i.e. Cape Argus Pick n Pay] Cycle Tour, that is also home-grown. Now, it is 38 000 timed cyclers, from [i.e. with] both domestic and international participation (R1).

From these views on home-grown events, respondents believed that it is imperative for the city and nation to capitalise on such events for tourism and destination branding benefits through strategic planning of home-grown sport. Typical opportunities for leveraging in the literature in which respondents agreed upon usually include the huge following of event visitors (participants and spectators), as well as the trade and media that follows an event (Chalip, 2004). However, the current study argues for additional opportunities linked to trade and exhibitions that present new business for the destination. Respondents consistently recognised the “value of trade exhibitions and conventions in its return on investments” (R8), thus should be planned and leveraged accordingly. From a practical perspective, a key informant in events planning recognised the value of other sport- or non-sport-related business opportunities, various South African provinces have set up conventions and events bureaus for supporting both sport and business conventions. For example;

Gauteng tourism has set up a Gauteng Conventions and Events Bureau. So has [i.e. have] a few other provinces ... South African Tourism now has the National Conventions and Events Bureau. The focus of these Bureaus are [i.e. is] not only on conventions and exhibitions but it [i.e. they] also supports [i.e. support] sport and cultural events. They have now realised the need for this type of entity that is going to support events (R3).

By adding conventions, exhibitions, sport, and cultural events to the list of attractions on the events calendar, South Africa could competitively position its brand amongst other leading global conference and convention hosts, such as Australia, which has successfully achieved brand positioning as a result of its sport event leveraging (Chalip, 2002). Moreover, from an event media perspective, respondents agreed that “media plays a significant role in enhancing the image of South Africa around sport events” (R12). However, it is argued by some key informants that the media (both mainstream and social media) can be used more effectively to convey more authentic brand messages of South Africa instead of the dominant messages of crime and socially unsettled issues currently plaguing the country. While such negative media perceptions have not necessarily impacted on visitation numbers for avid sport event fans, as is espoused by Tichaawa and Bob (2015), (R8) emphasised that strategic media partnerships are important for conveying positive messages of the destination and made the following practical recommendation towards this strategic planning:

There are opportunities to establish relationships with media houses and journalists around events, to deliberately brand the event and South Africa as a destination. When there is an event, we would take care of travelling sports journalists. We will entertain them; we will show them what South Africa is all about. We have a hosting programme as well, where we host journalists from around the world, so it's how do you align the hosting of sports journalists to get positive messages across (R8).

While strategic partnerships with event media are encouraged, respondents similarly believe in the benefits of establishing partnerships between the local, national

and provincial government, tourism departments and respective sport event organisers and commercial sport brand sponsor in order to facilitate the strategic planning of all facets of the destination branding through home-grown sport. However, the disconnected strategic objectives and mandates of individual stakeholders in government- that speaks towards the social imperatives of the destination- and private businesses-that are usually linked to profit- mostly implicate strategic planning of effective stakeholders' collaborative efforts. Thus it is reiterated by Hemmonsbeey and Tichaawa, (2018) that the fostering of stakeholder collaboration has become a clear imperative in addition to the strategic objectives as mentioned in the general event leveraging framework by Chalip (2004). Due to the significant finding on stakeholder collaboration and varied objectives, these results underpin previous studies conducted on strategic planning by Cooper (1995) and Bramwell (1997) as well as in recent leveraging research by O'Brien and Chalip (2008) and Smith (2014) and the findings of Hemmonsbeey and Tichaawa (2018) which, when all things considered, threatens the trajectory of strategic planning through the use of sport and in particular home-grown events.

The importance of stakeholder engagement in the strategic planning process

Despite the need to refine stakeholders' collaborative efforts, when approaching strategic planning through leveraging activities, respondents believed that there are key duties that stakeholders need to fulfill. From policy perspective, the municipal or local government is believed to act as the sponsor of home-grown events. Sponsorship may take various forms, for example, cash or in-kind rewards in terms of "providing medical and traffic services, [as well as] making sure that the event runs smoothly" (R5). From a destination branding perspectives, local destination marketing organisations "invest in tourism destination marketing and also the marketing of the city as a brand, through our marketing agencies and marketing events" (R6). Similarly, the role of the actual event is to ensure that "the event is a success" and that "we [the event] reaches its financial and social targets" (R4). While local government has, however, establish their clear roles in terms of event sponsorship, home-grown events provide the platform strategic planning through stakeholder engagement where this particular group of stakeholder can now extend their contribution towards strategic marketing initiatives in tandem with destination marketing organisations and commercial sport brand sponsors of a particular event. As such, the responsibility of strategic branding and sport event leveraging is alleviated from one group of stakeholders to a variety of different stakeholder groups, which further creates symbiotic stakeholder relationships across the entire range of stakeholders in sport and tourism.

Examples of such strategies not only emanate in the co-branding strategies of the local and provincial government in their strategic visions to position events at the forefront of the destination brand but also in the national imperative to stimulate tourism through both corporate and sporting events. An example of co-branding is provided by a key informant in local government as a result of their strategic planning;

Cash is only one way, in terms of the brand, [that] we invest in tourism destination marketing and also the marketing of the city as a brand, through our marketing agencies and marketing events. We [the city] have the slogan, and we push that into our city's events. Therefore, marketing, co-marketing, co-branding, television rights, and sharing in the income stream of that, make our leveraging possible (R6).

In relation to the destination brand image, strategic planning through co-branding initiatives proved to be consistent across the views of respondents. For example, a wide-

range of respondents believed that it is important to establish a direct association of event and host city brand. In that way, event visitors inherently associate the destination with sport and vice versa. This type of strategic initiative is arguably not otherwise possible with destinations paring their brand image with sport mega-events events with a once-off nature does not provide regular opportunities for brand image association. Such views are emphasised by a key informant in local government in that;

We [the city] have pushed ourselves to say that we are going to brand events. So, you will always get that 'Cape Town' or 'Western Cape' name attached to the event for [purposes of] familiarity and awareness. For example, the Cape Town Cycle Tour [and the] Cape Town Marathon. (R1).

Such performance of co-branding supports research, in terms of the important role played by stakeholders within the sport tourism domain, according to which the stakeholders are seen to pool resources in the strategic planning and management of sport tourism events (Tichaawa et al., 2018).

IMPLICATIONS AND CONCLUSION

The present study purposed to determine the views of stakeholders on tactics that form part of strategic planning around home-grown events which stimulate and promote tourism and destination branding benefits for the host destination. The leveraging theory essentially recognises events as opportunities for strategic planning, however such theory is typically informed from the perspective of developed destination contexts (Chalip, 2004). On the basis of the results and discussions, strategic planning is greatly advocated for destination branding benefits in terms of tourism and economic development which is congruent with the benefits presented within the widespread theoretical notion on leveraging. However, from a developing destination perspective, strategic planning of events is further encouraged to augment and to, more importantly, contribute to unique elements of the destination brand, such as, global brand positioning; social imperatives in health and education; trade and exhibitions; and international media perceptions, thus extending the leveraging theory to include unique brand related elements for strategic consideration when approaching sport event planning and hosting. A further contribution to the destination branding theory is made by investigating a developing, African brand with unique brand attributes and offerings which are frequently neglected in the extant destination branding literature.

One implication related to stakeholder practice and policies is linked to the alignment of strategic objectives for leveraging between event industry stakeholders and those stakeholders in local and national government, especially within the tourism and destination branding departments. The lack of strategic alignment in stakeholder objectives implicitly impede stakeholder collaboration efforts and strategic partnering especially pre, and post event hosting, despite their efforts to pool resources during the event hosting stage. International best practices demonstrate opportunities for stakeholder collaborations and highlight the efficacy of strategic partnerships and the integration of strategic objectives into the policies of a range of stakeholders within public and private entities, media and other tourism operatives during all stages of event hosting (Chalip, 2000; Grix 2012). Despite the consistent debate on stakeholder collaborative efforts and varied stakeholder objectives, the South African destination brand has realised the value of trade exhibitions and conventions in its return on investments from event support and has consequently been leveraging them towards achieving tourism benefits. The establishment of Conventions and Events Bureaus within various municipalities

implies that the need for this type of entity to support events has been recognised. To this end, the results reveal a clear strategic initiative in the form of strategic partnerships, beyond those opportunities mentioned in the leveraging theory related to international perspectives. Therefore, to achieve realised benefits from sport event hosting, serious attention should be given to policy development where industry and government objectives align and where event planning and hosting are approached more strategically by being inclusive to other tourism and economic opportunities.

More specific to sport events, while the literature provides significant evidence of the use of mega-events for strategic planning, the results and discussions of this paper reveal the significant contribution of home-grown sport events to establishing value propositions for destination brand positioning. Compared to the mega-events that can be regarded as a stand-alone value proposition due to the global nature and unique hosting, home-grown events are encouraged to accompany other tourism amenities, such as the destination's natural attractions and tourism offerings, to particularly attract repeat visits and encourage longer visitor stays post-event hosting. What further sets home-grown events apart from the mega-events is not only the recurring nature in event hosting which results in an annual reach and frequency of sport tourists to a destination but also the ability to engage in strategic co-branding initiatives where destination stakeholders merge their brand identities to form associations in the minds of their target audience.

For example, the Cape Town Cycle Tour event allows government and event organisers together with their commercial sport brand sponsors to leverage the event through its name brand identity. This causes Cape Town to be viewed as a global brand and therefore attracting global audiences to a local event. Such strategic marketing initiatives, therefore, distinguish the destination brand image while engaging stakeholders in both public and private institutions/environments/industries. Despite the view that collaboration between key stakeholders appear elusive, such strategic initiatives present a start to strategic stakeholder partnerships. For the broader South African destination brand however, strategies to incorporate such marketing initiatives are not essentially implemented despite being realised across stakeholder perceptions. While a dialogue of strategic planning in the context of home-grown sport events is introduced, this study acknowledges that critical analysis into a specific home-grown event case might deepen the understanding of stakeholder collaboration and provide justifications into their decisions to secure strategic partnerships. This could be of relevance to stakeholder confidence at both local and national levels to commit to sport event leveraging initiatives through home-grown events. This study presents unique insights into the developing destination context in relation to sport event hosting and strategic planning through leveraging activities which has been extensively overlooked in the known destination branding and sport event leveraging theory. Therefore it makes a significant and unique contribution to the extant destination branding and event leveraging discourse. While the dialogue of home-grown events has started, this concept could be further explored in relation to its influence on other destination amenities such as trade industries.

Acknowledgments

This paper is developed based on a doctoral thesis submitted to the University of Johannesburg, by the same authors.

REFERENCES

- Anholt, S. (2005). Some important distinctions in place branding. *Place Branding*, 1(2):116-121.
Baker, B. (2012). *Destination branding for small cities*. 2nd edition. Portland, OR: Creative Leap Books.

- Balakrishnan, M. S. (2009). Strategic branding of destinations: A framework. *European Journal of Marketing*, 43(5/6):611-629.
- Boisen, M., Terlouw, K., Groote, P. & Couwenberg, O. (2018). Reframing place promotion, place marketing, and place branding – moving beyond conceptual confusion. *Cities*, 80:4-11.
- Bramwell, B. (1997). Strategic planning before and after a mega-event. *Tourism Management*, 18(3): 167-176.
- Brown, G., Chalip, L., Jago, L. & Mules, T. (2004). *Developing brand Australia: Examining the role of events*. In Destination branding: Creating the unique destination proposition: 279-306. Edited by Morgan, N., Pritchard, A. & Pride, R. 2nd edition. Oxford: Elsevier.
- Camilleri, M. A. (2018). *Strategic perspectives in destination marketing*. London. IGI Global.
- Chalip, L. (2002). *Using the Olympics to optimise tourism benefits: University lecture on the Olympics*. Barcelona: Centre d'Estudis Olímpics (UAB). Available from: <http://olympicstudies.uab.es/lectures/web/pdf/chalip.pdf>
- Chalip, L. (2004). *Beyond impact: A general model for host community event leverage*. In Sport tourism: Interrelationships, impacts and issues: 226-252. Edited by Ritchie, B. W. & Adair, D. London: Channel View.
- Chen, N. & Funk, D. C. (2010). Exploring destination image, experience and revisit intention: A comparison of sport and non-sport tourist perceptions. *Journal of Sport & Tourism*, 15(3):239-259.
- Chen, S. & Misener, L. (2019). Event leverage in a non-host region: challenges and opportunities'. *Journal of Sport Management*, (00): 1-14.
- Cooper, C. (1995). Strategic planning for sustainable tourism: the case of the offshore islands of the UK. *Journal of Sustainable Tourism*, 3(4):191-209.
- Cornelissen, S., Bob, U. & Swart, K. (2011). Towards redefining the concept of legacy in relation to sport mega-events: Insights from the 2010 FIFA World Cup. *Development Southern Africa*, 28(3):307-318.
- Filo, K., Chen, N., King, C. & Funk, D. C. (2013). Sport tourists' involvement with a destination: A stage-based examination. *Journal of Hospitality & Tourism Research*, 37(1):100-124.
- Getz, D., Svensson, B., Peterssen, R. & Gunnervall, A. (2012). Hallmark events: Definition and planning process. *International Journal of Event Management Research*, 7(1/2):47-67.
- Giampiccoli, A., Lee, S. & Nauright, J. (2015). Destination South Africa: Comparing global sports mega-events and recurring localised sports events in South Africa for tourism and economic development. *Current Issues in Tourism*, 18(3):229-248.
- Govers, R. & Go, F. (2009). *Place branding: Global, virtual and physical identities, constructed, imagined and experienced*. Basingstoke: Palgrave Macmillan.
- Greaves, N., & Skinner, H. (2010). The importance of destination image analysis to UK rural tourism. *Marketing Intelligence & Planning*, 28(4): 486-507.
- Grix, J. & Lacroix, C. (2006). Constructing Germany's image in the British press: An empirical analysis of stereotypical reporting on Germany. *Journal of Contemporary European Studies*, 14(3):373-392.
- Grix, J. (2012). 'Image' leveraging and sport mega-events: Germany and the 2006 FIFA World Cup. *Journal of Sport and Tourism*, 17(4):289-312.
- Hanna, S. & Rowley, J. (2008). An analysis of terminology use in place branding. *Journal of Place Branding and Public Diplomacy*, 4(1):61-75.
- Hemmonsby, J. & Knott, B. (2016). Branding an African city through sport: The role of stakeholder engagement. *African Journal of Hospitality, Tourism and Leisure*, 5(3):1-14.
- Hemmonsby, J., & Tichaawa, T.M. (2019). Using non-mega events for destination branding: a stakeholder perspective. *GeoJournal of Tourism and Geosites*, 24(1): 252-266.
- Hemmonsby, J., Tichaawa, T. & Knott, B. (2018). Conceptual framework for strategic destination branding through leveraging home-grown sport events. *South African Journal for Research in Sport, Physical Education and Recreation*, 40(2):81-98.
- Horne, J. & Manzenreiter, W. (2006). An introduction to the sociology of sports mega-events. *Sociological Review*, 54 (Supplement 2):1-24.
- International Olympic Committee. (2009). *Beijing facts and figures report, August 2009 Update*. Available from https://www.olympic.org/olympic-legacy/~/_media/A8264DD681D34B459Bo26CBD6FFD4D78.ashx
- Jago, L., Dwyer, L., Lipman, G., Van Lill, D. & Voster, S. (2010). Optimising the potential of mega-events: An overview. *International Journal of Event and Festival Management*, 1(3):220-237.
- Kapferer, J. N. (2012). *The new strategic brand management: Advanced insights and strategic thinking*. 5th edition. London: Kogan Page.
- Karadakis, K. & Kaplanidou, K. (2012). Legacy perceptions among host and non-host Olympic Games residents: A longitudinal study of the 2010 Vancouver Olympic Games. *European Sport Management Quarterly*, 12(3):243-264.
- Kim, W., Jun, H., Walker, M. & Drane, D. (2015). Evaluating the perceived social impacts of hosting large-scale sport tourism events: Scale development and validation. *Tourism Management*, 48:21-32.
- Knott, B., Fyall, A. & Jones, I. (2017). Sport mega-events and nation branding: Unique characteristics of the 2010 FIFA World Cup, South Africa. *International Journal of Contemporary Hospitality Management*, 29(3):900-923.
- Kotze, N. (2006). Cape Town and the Two Oceans Marathon: The impact of sport tourism. *Urban Forum*, 17(3):282-293.

Strategic Planning of Sport Tourism Events on Destination Brands: Examining the Role of Home-Grown Sport

- Lui, D. (2016). Social impacts of major sports events perceived by host community. *International Journal of Sport Marketing and Sponsorship*, 17(1):78-91.
- Maharaj, B., Sucheran, R. & Pillay, V. (2006). Durban – A tourism mecca? Challenges of the post-Apartheid era. *Urban Forum*, 17(3):262-281.
- Marshall, C. & Rossman, G. (2006). Designing qualitative research. Thousand Oaks, CA: SAGE.
- Morgan, N. J., Pritchard, A. & Pride, R. (2010). *Destination branding: Creating the unique destination proposition*. 2nd revised edition. Oxford: Elsevier.
- Nauright, J. (2013). Selling nations to the world through sports: Mega-events and nation branding as a global diplomacy. *Public Diplomacy Magazine*, (9):22-27.
- O'Brien, D. & Chalip, L. (2008). *Sport events and strategic leveraging: Pushing towards the triple bottom line*. In Tourism management: Analysis, behaviour and strategy: 318-338. Edited by Woodside, A. G. & Martin, D. Washington, DC: CABI.
- Pike, S. D. (2009). Destination brand positions of a competitive set of near-home destinations. *Tourism Management*, 30(6):857-866.
- Ritchie, J. R. & Ritchie, R. J. B. (1998). *The branding of tourism destinations: Past achievements and future challenges*. A basic report prepared for presentation to the 1998 Annual Congress of the International Association of Scientific Experts in Tourism Marrakech, Morocco, September 1998.
- Smith, A. (2014). Leveraging sport mega-events: New model or convenient justification? *Journal of Policy Research in Tourism, Leisure and Events*, 6(1):15-30.
- Swart, K. & Bob, U. (2012). Mega sport event legacies and the 2010 FIFA World Cup. *African Journal for Physical, Health Education, Recreation and Dance*, September (Supplement 1):1-11.
- Swart, K., Tichaawa, T., Othy, J. D. O. & Daniels, T. (2018). Stakeholder perspectives of sport tourism development in Gabon: A case study of the Africa Cup of Nations. *EuroEconomica*, 1(37):177-189.
- Tichaawa, T. M. & Bob, U. (2015). Leveraging mega-events beyond the host nation: A case study of the 2010 FIFA World Cup African Legacy Programme in Cameroon and Nigeria. *Leisure Studies*, 34(6):742-757.
- Turco, D. M., Swart, K., Bob, U. & Moodley, V. (2003). Socio-economic impacts of sport tourism in Durban Unicity, South Africa. *Journal of Sport Tourism*, 8(4):223-239.
- Weed, M. (2009). Progress in sports tourism research? A meta-review and exploration of futures. *Tourism Management*, 30(5):615-628.
- Zhang, L. & Zhao, S. X. (2009). City branding and the Olympic effect: A case study of Beijing. *Cities*, 26(5):245-254.
- Ziakas, V. & Boukas, N. (2014). Post event leverage and Olympic Legacy: A strategic framework for the development of sport and cultural tourism in post-Olympic Athens. *Journal of Sport*, 1(2):87-102.
- Ziakas, V. & Costa, C. A. (2011). The use of an event portfolio in regional community and tourism development: Creating synergy between sport and cultural events. *Journal of Sport and Tourism*, 16(2):149-175.
- Ziakas, V. (2018). *Integrating sport events into destination development: A tourism leveraging event portfolio model*. In EURAM Annual Conference 2018, 19-22 June 2018, University of Iceland, Reyjavic.

Submitted:
16.07.2019

Revised:
23.09.2019

Accepted and published online
25.09.2019

HERITAGE TOURISM IN UBEDA Y BAEZA (SPAIN). WORLD HERITAGE REINASSANCE CITIES

Jesús Claudio **PÉREZ-GÁLVEZ**

University of Cordoba, Department of Applied Economics,
Plaza Nueva Square, Córdoba, Spain, e-mail: dt1pedaj@uco.es

Tomás **LÓPEZ-GUZMÁN***

University of Cordoba, Department of Applied Economics,
Adarve Street, Córdoba, Spain, e-mail: tomas.lopez@uco.es

Miguel Jesús **MEDINA-VIRUEL**

University of Cordoba, Department of Applied Economics,
Plaza Nueva Square, Córdoba Spain, e-mail: mjmedina@uco.es

Mónica **TORRES-NARANJO**

University Polytechnic of Litoral, Faculty of Social and Humanistic Sciences,
Km 30.5. Via Perimetral, Guayaquil, Ecuador, e-mail: mmtorres@espol.edu.ec

Citation: Pérez-Gálvez, J.C., López-Guzmán, T., Medina-Viruel, M.J., & Torres-Naranjo, M. (2019). HERITAGE TOURISM IN UBEDA Y BAEZA (SPAIN). WORLD HERITAGE REINASSANCE CITIES. *GeoJournal of Tourism and Geosites*, 26(3), 808–820. <https://doi.org/10.30892/gtg.26311-399>

Abstract: This research is focused on the cities of Úbeda and Baeza and aims to characterize the type of tourists that visit them. The study investigates the characteristics of the trip, as well as the assessment that visitors make of the tourist attributes, recognizing differences between the various types of tourists. For this, a segmentation was made based on the cultural and patrimonial motivations of the tourists. This research uses the multivariate technique of grouping cases (K-means clusters) to analyse the similarity existing among the surveyed persons. From the groups or segments obtained, statistics and measurements of association were applied that provide the information necessary to study the possible trends of association existing between variables from a table of bidimensional contingencies. In the same way, non-parametric statistical procedures were used (Kruskal-Wallis H test and the Mann-Whitney U test). The visitors have been segmented according to their perception of the heritage and their cultural interest resulting in four types of tourists being identified: alternative tourist, cultural tourist, emotional tourist and heritage tourist. Also, the results reveal a higher valuation among tourists who present cultural motivations. This article contributes to complete the academic literature existing on the links of the tourist with the historical and monumental heritage that he visits, and with the tourist's behaviour.

* Corresponding author

Keywords: Renaissance, Cultural and heritage tourism, Tourist valuation, Tourist characteristics, Úbeda and Baeza, Spain

* * * * *

INTRODUCTION

This research intends to strengthen academic literature, contributing with tourism experiences in World Heritage Sites (WHS). Its fundamental objective is to analyze the relationships between the visitor's perception of the historical and/or monumental heritage that they visit and their behavior. To this end, a questionnaire was applied to a representative sample of tourists who visited the cities of Úbeda and Baeza (Spain). It provided information regarding both their socio-demographic characteristics (age, sex, profession or level of studies) and their motivations, the perception of the heritage place visited or the assessment of the city's tourist attributes. In this sense, Adie and Hall (2017) indicate the need to conduct studies in WHS. The geographical area object of this research focuses on two of the greatest exponents of the Spanish Renaissance: the cities of Úbeda and Baeza (Jaén). These two cities are located in the región of Andalucía, in southern Spain. The Spanish Renaissance is the expression used to define the influence of the artistic, architectural and cultural movement originated in the 15th century in Italy. The Renaissance featured artists such as Leonardo Da Vinci, Titian, Rafael Sanzio, Michelangelo Buonarroti or Filippo Brunelleschi. This artistic movement known as the Renaissance extends from Italy in the late 15th century to the rest of Western Europe.

It takes place in Spain in two stages called "Plateresque" and "Purism". It should be noted that the rise of the Spanish Renaissance was during the first half of the 16th century. In Spain, the Renaissance manifests itself in literature and art. To highlight the influence of this artistic movement in the Iberian country, the Renaissance pieces found in Andalusia can be studied. The Andalusian Renaissance has leading artists in the expression of their architecture as Andrés de Vandelvira. The cities of Úbeda and Baeza have an evident Renaissance style that allowed them to be declared (in 2003) as a World Heritage Site by UNESCO. While there is broad academic literature that addresses the relationship between a WHS and tourism, the existing evidence is not conclusive at this time. Ribaudó & Figini (2016), to elucidate the impact that a WHS has on a tourist destination, gathered some questions present in previous studies by different authors (Poria et al., 2006, Poria et al., 2013, Su & Wall, 2011). In this sense, they deal with the influence that the inscription of a place in the UNESCO lists has on the promotion and management of the destination, the social and economic impact that is generated by said registration, the analysis of the perceptions and attitudes of the visitors in WHS or the impact of the inscription on the UNESCO list on tourism flow.

This research contributes to the academic literature with an empirical study that allows a better understanding of the visitors' behavior in a WHS. This allows an efficient management of the destination and the design of strategies by the authorities and operators involved in the tourism sector. To achieve this, the relationship between tourists and the artistic and cultural heritage in the cities of Úbeda and Baeza was analyzed in order to examine what is defined in literature as heritage tourism. According to Nguyen and Cheung (2014), heritage tourism involves visiting and having experiences in places that have an artistic and monumental heritage. Poria et al. (2006) establish that this experience supposes a better understanding by visitors of the destination through what this cultural heritage represents for the tourists. Also, Poria et al. (2003) establish

that visiting patterns in a destination are related to the perception that visitors have and their identification of the place with their own culture and, therefore, they conclude that their behavior will be different from the rest of the tourists. It is noteworthy that McKercher (2002) establishes two dimensions to make a segmentation of tourists visiting a cultural destination: the first being the cultural motivation that a visitor has to move to a place, and the second being the depth of their knowledge regarding this type of cultural heritage. Following the model developed by Poria et al. (2003) and McKercher (2002), it is intended to make a segmentation of tourists who go to cultural destinations such as Úbeda and Baeza. To achieve the objectives of this research, the research is structured as follows: after this first section, the second section critically analyzes the main findings of the academic literature, the third section presents the methodology used, while the fourth section highlights the main results of the investigation. Finally, the conclusions are exposed in the fifth section and with the bibliographic references used.

LITERATURE REVISION

Heritage tourism

The design of strategies aimed at improving the management of a tourist destination is a relevant aspect in the agenda of the makers of public policies in the tourism sector. Therefore, understanding the behavior of visitors is important for both public administrations and the private sector to carry out a good planning and implementation of these strategies. In this sense, the analysis of the links between visitors and the artistic and monumental heritage (or cultural heritage) of a place contributes to deepen knowledge about heritage tourism. Nguyen and Cheung (2014) define heritage tourism as an experience in a cultural destination, and this implies, therefore, visiting certain places that are part of the culture of those tourists.

Visiting a WHS can be thought of as the journey made by a tourist to know their own heritage, to understand and reinforce their own culture through the visit (Poria et al., 2006). In accordance with the findings of Poria et al. (2003), the perception of a tourist about a certain destination, and set as part of their own cultural heritage, is linked to their visiting patterns, which can lead to a different behavior than other visitors.

Segmentation

In order to carry out both an efficient management of a tourist destination and a design of the strategies according to the existing demand in historic-heritage sites, it is necessary to identify and segment the tourists (Saipradist & Staiff, 2007). Likewise, it is also necessary to differentiate the World Heritage Tourist among other visitors (Adie & Hall, 2017). The determination of different types of heritage tourists, motivation, behavior and perception helps to understand these differences and also allows a more precise identification of who is called a heritage tourist (Nguyen & Cheung, 2014). Therefore, the segmentation of tourists that come to a WHS is basic for the managers of a cultural destination to do their job. As a result, the tourists that go to a WHS and are attracted to the artistic and historical heritage can be identified. The segmentation of this type of tourists is presented in different previous investigations. Among these investigations, the one carried out by Silberberg (1995) can be highlighted as the following typologies are established: accidental cultural tourist, adjunct cultural tourist, in part cultural tourists and greatly cultural tourists. Accordingly, McKercher (2002) establishes different typologies based on the importance of cultural motivations and the depth of the knowledge that travellers have of that place. Namely: pragmatic tourist, contemplative tourist, casual tourist, incidental tourist and fortuitous tourist. It should be noted that Nguyen and Cheung (2014) replicated this model in a subsequent investigation.

On the other hand, Poria et al. (2003) classify tourists according to their perception of the heritage of the place, as well as the relationship between the destination and the tourist. They establish the following groups of tourists: tourists who are in places not related to their own heritage; tourists who visit places where there is an important part of their heritage, and tourists who are not aware that this place is part of their heritage. Taking this into consideration, the hypotheses to be examined would be the following:

H1: Some tourists have emotional experiences that lead them to feel more than to contemplate the place they visit.

H2: Considering the emotional experiences and the cultural interest in a WHS, there are different types of visitors.

Socio-economic characteristics of the foreign tourist

For both public and private managers, the knowledge that can be obtained about the sociodemographic profile of tourists is crucial to efficiently manage a tourist destination. Therefore, one of the topics most addressed in the academic literature is the characterization of the socioeconomic aspects of the tourist who visits a destination.

In this sense, it has been analyzed if the gender of visitors is a key element in terms of attracting tourists to a certain destination (Al-Rousan et al., 2019). However, the empirical evidence does not indicate conclusive results in this case. There are several studies that evidence that women prefer these cultural places (Vong & Ung, 2012; Nguyen & Cheung, 2014; Remoaldo et al., 2014; Ramires et al., 2017). On the other hand, there are also studies that show the contrary and conclude that men are the ones who are most attracted to these destinations (Correia et al., 2013; Antón et al., 2017; Chen & Huang, 2017; Hall, 2017). Controversy is also present in relation to another of the variables analyzed in this type of studies: age. Thus, empirical evidence indicates quite different age brackets. For example, Chen and Huang (2017) identify tourists between 21 and 35 years old; Anton et al. (2017) find ages between 30 and 44 years; Remoaldo et al. (2014) identify ages that range from 26 to 45; Huh, Uysal and McCleary (2006) show ages that range between 38 and 47 years; and Correia et al. (2013) and Ramires et al. (2017) establish ages over 45 years. In relation to the level of training, the existing academic literature indicates that visitors who go to destinations where an artistic and monumental heritage predominates have a certain level of university academic training.

As a matter of fact, this is the most representative group (Silberberg, 1995; Huh et al., 2006; Correia et al., 2013; Remoaldo et al., 2014; Antón et al., 2017; Ramires et al., 2017; Adie & Hall, 2017). In the same sense, Chen and Huang (2017) mention that it should be taken into account that another important group of tourists is made up of students, since this group also usually goes to these destinations. Likewise, most of the empirical studies (Chen & Huang, 2017; Antón et al., 2017; Ramires et al., 2017) indicate that visitor's income that come to these places is average or above average. These findings are complemented by the results found regarding the level of academic training that characterizes this group of tourists (Huh et al., 2006; Correia et al., 2013; Bright & Carter, 2016; Chen & Huang, 2017; Antón et al., 2017; Ramires et al., 2017). Following the existing literature, the hypotheses to be tested would be the following:

H3: The cultural interest in a WHS increases with the age of the tourist.

H4: Travelers with a greater cultural interest in a WHS have more academic training.

H5: Tourists with a greater cultural interest in a WHS generate a greater economic impact on the visited destination.

Evaluation of the attributes of the destination

Lew (1987) points out that the set of elements that attract the visitor represent the attributes of a tourist destination and that the ability to attract tourists will be subject to

the social and personal benefits that may be perceived by the individuals who visit the place. In this way, the attributes of the destination constitute a fundamental factor for the tourist to have a memorable experience (Tung & Ritchie, 2011; Kim, 2014). Therefore, if the tourist has a rewarding experience in that place, their level of satisfaction increases and this implies having greater loyalty towards the destination and, consequently, promoting it (Ozdemir et al., 2012). For this, some key elements must be combined, such as heritage, infrastructure, gastronomy or cultural exchange (Chi & Qu, 2008; Kim & Brown, 2012). However, it is necessary to remember that not all attributes provide a competitive advantage of the place with the same intensity (Prayag, 2008). Some scientific studies contribute to understanding how attributes generate satisfaction and create a target image. Thus, it has been possible to determine which are the key attributes to be able to evaluate a destination and to establish the components that collect said attributes. These include gastronomy and city safety (Driscoll et al., 1994; Dwyer & Kim, 2003; Beerli & Martín, 2004; Chi & Qu, 2008; Crouch, 2011; Chandralal & Valenzuela, 2013; Kim, 2014).

METHODOLOGY

Questionnaire and procedure

The methodology used for the development of this research was based on the realization of a fieldwork, based on a structured questionnaire that was passed on to a representative sample of tourists who visited the cities of Úbeda and Baeza. Among the options that were available to collect the information, the design chosen was a closed questionnaire to be self-administered. In order to guarantee its validity, the formulation of the items was based on different previous investigations (McKercher, 2002; Poria et al., 2003; McKercher & du Cros, 2003; Correia et al., 2013; Remoaldo et al., 2014). From an initial set of items, a process of sorting them in three phases was followed. Namely: first, a researcher specialized in the tourism sector analyzed the proposed items; second, the resulting questionnaire was reviewed by several people in charge of the tourist activity in those cities; third, a pre-test was made to 50 tourists. The final version of the questionnaire sought to have the maximum understanding of the questions and the greatest adjustment of the answers to achieve the objectives set in the research.

Likewise, the questions were intended to be straightforward to not extend the interview too much to the visitors who did the survey. The questionnaires were carried out in different places of the historical centers of both cities, obtaining a similar number of questionnaires in both cities, and with the premise that the tourist taking part on the survey had already spent certain time in the destination and, therefore, could give a well-founded opinion (Correia et al., 2013; Remoaldo et al., 2014). As for the structure of the questionnaire, it was divided into two large blocks: a first block focused on the analysis of the emotional perceptions of the historical and monumental heritage visited and the assessment made of the main attributes related to the visit; and a second block that collected the sociodemographic characteristics of visitors such as age, gender, economic level or degree of education. The questions in the first block of the questionnaire were answered through a five-point Likert scale. The questions in the second block were closed. The questions were formulated in a positive and negative sense to avoid acquiescence.

The questionnaires were conducted by a team of interviewers linked to the University of Córdoba (Spain) and the municipalities of Úbeda and Baeza. They were passed in three languages (Spanish, English and French). Each tourist chose the language of the questionnaire. A total of 561 questionnaires, of which 528 were valid, were completed between the months of January and July 2017. The questionnaires were carried out on different days and at different times in the historic centers of the two cities

to try to collect the widest possible range of people and situations. A non-probabilistic technical sampling, commonly used in this type of research, was used, which means that tourists interviewed were available to do the survey in a given time and space (Finn et al., 2000). It was not stratified by age, gender, nationality, level of education or by any other variable, since there were no previous studies to support this stratification. The rejection rate to the questionnaire was low and not significant depending on any of the variables. The questionnaire did not last longer than 10 minutes.

Sample and data analysis.

This research is specifically about the national and international tourist who visits the Renaissance Monumental Ensembles of Úbeda and Baeza, regardless of whether they stay overnight or not, or if they visit other places in the region of Andalusia. The number of tourists who visited these cities in 2016 was 70,537 (Ministry of Economy and Knowledge, 2016). Therefore, based on this number of visitors and for guidance only in the case of random sampling, the sampling error for a confidence level of 95% would be $\pm 4.25\%$. The tabulation and the statistical analysis of the data have been carried out using the SPSS v. 23 statistics program. Statistics have been applied to assess the reliability and validity of the questionnaire responses (Cronbach's alpha).

The multivariate technique of grouping cases (K-means conglomerates) has been used in order to analyze the similarity between the respondents. The discriminant analysis technique has been used to validate the grouping of cases obtained in the cluster analysis. From the groups or segments obtained, statistical and association measures that provide the necessary information to study the possible patterns of association between variables from a two-dimensional contingency table have been applied. Likewise, non-parametric statistical procedures (H of Kruskal-Wallis and the U of Mann-Whitney) have been used in order to analyze significant differences between groups of the sample.

RESULTS

Perception of historical heritage and tourist segmentation

In order to analyze and segment the sample, surveyed tourists were asked to assess the emotions perceived when visiting historical and monumental heritage. For this, the model of Poria et al. (2003) and the McKercher model (2002) were used. The different items used are shown in Table 1. The Cronbach alpha coefficient of the final scale reaches a value of 0.767, indicative of a meritorious internal consistency between the elements of the scale. The critical level (p), associated with Friedman's statistical χ^2 (570,099) of the analysis to test the null hypothesis that all the elements of the scale have the same mean, is less than 0.001, thus rejecting the hypothesis that the means of the elements are equal.

A non-hierarchical conglomerate analysis was carried out to elaborate similar groups and to know their characteristics. Under the criterion of maximizing the variance between typologies, and minimizing the variance within each of them, the best solution that meets these criteria establishes four clusters or segments. For its confirmation, the H test of Kruskal-Wallis (1952) was carried out. Table 1 shows the characterization of the clusters based on the means of the four items that aims to measure the tourist's perception of the visited heritage (Poria et al., 2003) and of the two items that evaluate their cultural motivation regarding the destination (McKercher, 2002).

The four segments detected are the following: (1) alternative tourist (2) cultural tourist, (3) emotional tourist and (4) heritage tourist. The first of the segments is made up of 9.3% of the surveyed tourists, with the group that registers significant low records in each of the items. This cluster is called an alternative tourist, and groups visitors whose cultural identity is not related to the heritage they visit. The second group represents 44.3% of the sample and is characterized by grouping tourists whose cultural identity is

not related to the heritage visited, although they have a cultural interest in the destination. This cluster is called a cultural tourist. The third group comprises 19.7% of the respondents, scoring intermediate scores in the items related to the perception of historical heritage and low records in relation to the cultural interest for the destination. This cluster has been called an emotional tourist. The fourth of the segments is characterized by a high emotional connection with the visited heritage and cultural interest for the destination. It has been called a heritage tourist (26.7%). Within this last group it is observed that 57% of the surveyed tourists share a common identity that is related to the visited destination. These tourists are those with a greater proximity to the selected destination, sharing, therefore, the cultural identity of the Andalusian Renaissance (region of belonging to the cities of Úbeda and Baeza).

Table 1. Characterization based on perception of historical heritage and cultural interest

	Tourist Clusters				Kruskal–Wallis H	
	1	2	3	4	χ^2	Sig.
Perception of Historical Heritage (Average)						
My visit to the historical heritage of the city moved me	3.10	3.41	3.79	3.80	21.673	< 0.000
During my visit I felt as part of the heritage	2.06^(*)	2.59^(*)	2.93	3.04	28.457	< 0.000
My visit to the historical heritage of the city made me feel good	3.94	4.11	4.11	4.06	1.381	< 0.710
My visit to the historical heritage of the city has contributed to my education	2.84^(*)	3.54^(*)	3.89^(*)	4.04^(*)	51.089	< 0.000
Cultural Interest (Average)						
To know the city's wealth of monuments and history	1.78^(*)	4.50^(*)	3.60^(*)	4.98^(*)	257.055	< 0.000
To get a deeper knowledge of the city's heritage	1.33^(*)	3.31^(*)	2.11^(*)	4.86^(*)	429.188	< 0.000
<i>(*) The values in italic type present significant differences in three of four of the means clusters. The Mann–Whitney U-test was applied to test for the significant differences between the different means</i>						

The results obtained in this research allow to contrast the first two research hypotheses: first, regarding the results obtained by the previous academic literature (Urry, 1990; Bruner, 1996; Cheung, 1996; Poria et al., 2003; Poria et al., 2006), some tourists have emotional experiences that lead them to feel the place they visit as their own (H1); second, there are different types of tourists attending to the emotional experiences and cultural interest for the visited heritage (H2) (Silberber, 1995; McKercher, 2002; McKercher & Du Cros, 2003; Poria et al., 2003; Poria et al., 2006).

Socio-economic characteristics of the foreign surveyed tourist

From the 528 tourists surveyed, 57.1% were men and the remaining 42.9% were women. There were no significant differences in the data collection over the different months. The visitors surveyed are, in general terms, young. Table 2 reflects how 59.6% of the sample are less than 40 years old. Older tourists are more representative in those segments that show a greater cultural interest for the destination (statistical H of Kruskal–Wallis = 8,387, $p = 0,039$). This result allows to contrast another of the proposed research hypothesis: the cultural interest for a WHS increases with the age of the tourist (Tse & Crotts, 2005) (H3). Younger tourists –that is, the group under 30– usually travel accompanied by their partner and/or friends, co-workers or alone, detecting an association between age and the company with which they travel (contingency coefficient

= 0.484, $p = 0.000$). The tourist aged between 40 and 49 years old usually travels with their partner and children. Regarding the professional category of tourists doing the survey, full-time salaried workers, public employees and students stand out.

The level of academic training of the respondents is medium-high, as shown in Table 2. It is important to highlight the considerable percentage of university graduates, since 59% of the respondents declare that they have a university degree or postgraduate degree. When analyzing the level of studies according to age, no differences were detected (gamma coefficient = -1.115, $p = 0.265$). On the other hand, differences are detected by clusters. Thus, the alternative tourist segment is characterized by having a lower presence of tourists with university studies (graduate and postgraduate) (statistical H of Kruskal Wallis = 20,900, $p = 0.000$). The results would support the hypothesis (H4) on the greater cultural interest for a WHS by those travellers with a higher academic education.

Regarding the place of origin, national tourism represents 76.4% of the total number of tourists arriving in the cities of Úbeda and Baeza. On the other hand, 39.4% of tourists belong to the region where these cities are located, Andalusia. The international tourist represents 23.6%. Of the total of foreign tourists, Germany (15%), France (7.4%) and the United Kingdom (4.4%) are the three countries with the most visitors from all of the twenty different nationalities detected in the investigation. The analysis by segments shows a high level of association between the emotional and cultural interest of tourists and their country of origin (contingency coefficient = 0.364, $p = 0.039$). Thus, the presence of visitors from the region where these two cities are located is much more representative in the emotional tourist cluster than in the rest of the groups, being, therefore, an evidence of the common identity of these tourists: the cultural identity of the Andalusian Renaissance. The analysis of the monthly income by family reveals that 24.4% of visitors surveyed reported having an income of less than 1,000 euros per month compared to 18.1% who claim to earn more than 2,500 euros (Table 2).

This is not an obstacle to check that tourists who come to the cities of Úbeda and Baeza have a medium-high purchasing power. Thus, more than half of them declare an income between 1,000 and 2,500 euros per month (31.9% between 1,000 and 1,500 euros, and 25.7% between 1,500 and 2,500 euros). In this sense, there are significant differences relating the level of income to the emotional attachment and cultural interest for the destination (statistical H of Kruskal Wallis = 11,540, $p = 0.009$).

The average level of income declared by the alternative tourist is 19% lower than the average, and 25% lower than that declared by the cultural tourist. On the other hand, there is a positive relationship between the level of family income and the planned expenditure of the visitor (gamma coefficient=0.174, $p=0.000$). Thus, tourists who declare higher levels of income spend more money, and conversely, those who declare lower rents have lower spending forecasts. In this sense, the greater purchasing power of the cultural tourist segment translates into a higher planned expenditure, there being differences between the four groups (statistical H of Kruskal Wallis = 11.837, $p = 0.008$). The emotional tourist spends less money than other tourists.

In the opposite direction, those that declare a greater cultural interest for the destination spend more (Table 2). These results support the hypothesis (H5) that tourists with a greater cultural interest generate a greater economic impact on the destination visited (Fields, 2002). In relation to repeating the visit, the segment of tourists with a greater emotional attachment register a somewhat higher index with respect to the rest of the groups since 42.6% declare they already know the destination (statistical H of Kruskal Wallis = 16.521; $p = 0.001$). These results may imply that the tourist's emotional experience is associated with fidelity to this destination.

Table 2. Sociodemographic profile of the tourist in Úbeda and Baeza

Variables	Categories	Tourist Clusters				Total
		Alternative	Cultural	Emotional	Heritage	
Gender (N = 524)	Male	56.3%	59.7%	64.4%	47.5%	57.1%
	Female	43.8%	40.3%	35.6%	52.5%	42.9%
Age (N = 522)	Under 30	24.5%	21.4%	32.7%	35.0%	27.6%
	30-39	36.7%	33.2%	37.5%	24.3%	32.0%
	40-49	18.4%	23.6%	15.4%	18.6%	20.1%
	50-59	12.2%	13.5%	8.7%	17.9%	13.6%
	60 and above	8.1%	8.3%	5.8%	4.3%	6.7%
Academic level (N = 507)	Primary education	20.4%	7.1%	10.2%	5.9%	8.7%
	secondary education	44.9%	26.7%	40.8%	31.1%	32.3%
	University education	28.6%	56.4%	41.8%	53.3%	50.1%
	Postgraduate/Master	6.1%	9.8%	7.1%	9.6%	8.9%
Professional category (N = 518)	Self-employed	22.4%	7.9%	13.7%	4.3%	9.5%
	Entrepreneur	-----	4.8%	2.0%	4.3%	3.7%
	Civil servant	6.1%	13.5%	9.8%	20.3%	13.9%
	Full-time employee	14.3%	24.5%	18.6%	17.4%	20.5%
	Part-time employee	6.1%	4.4%	8.8%	5.8%	5.8%
	Freelance	10.2%	8.7%	9.8%	8.7%	9.1%
	Student	16.3%	19.7%	23.5%	26.1%	21.8%
	Unemployed	12.2%	6.6%	7.8%	5.1%	6.9%
	Pensioner	4.1%	7.0%	3.9%	2.9%	5.0%
Income (N = 455)	Housewife	8.2%	3.1%	2.0%	5.1%	3.9%
	Less than 700€	22.0%	8.4%	11.7%	6.8%	9.9%
	From 700 to 999€	17.1%	8.9%	17.0%	21.4%	14.5%
	From 1,000 to 1,499€	26.8%	35.5%	36.2%	23.9%	31.9%
	From 1,500 to 2,499€	26.8%	25.1%	22.3%	29.1%	25.7%
	From 2,500 to 3,499€	7.3%	15.3%	5.3%	12.8%	11.9%
Diary spend (N = 520)	More than 3,500€	-----	6.9%	7.4%	6.0%	6.2%
	Less than 20€	4.2%	0.9%	5.8%	2.2%	2.5%
	From 21 to 40€	12.5%	9.1%	15.5%	15.8%	12.5%
	From 41 to 60€	14.6%	16.1%	22.3%	19.4%	18.1%
	From 61 to 80€	25.0%	27.4%	23.3%	23.7%	25.4%
	From 81 to 100€	27.1%	27.0%	23.3%	22.3%	25.0%
	From 101 to 120€	10.4%	16.3%	6.8%	8.6%	11.9%
Origin of the tourist (N = 525)	More than de 120€	6.3%	3.0%	2.9%	7.9%	4.6%
	Andalusia	40.8%	33.2%	57.3%	36.2%	39.4%
	Rest of Spain	51.0%	34.5%	35.0%	37.6%	37.0%
	Rest of the world	8.2%	32.3%	7.8%	26.2%	23.6%

Among the socio-demographic variables, the main factor that explains the differences in relation to the perception of the historical heritage visited is the country of origin of the visitor (Table 3). These significant differences (the H statistics of Kruskal Wallis reflects differences in two of the four items at 90% confidence level) it allows to support that the place of origin of the visitor, and with it their cultural identity, contitions that the emotional experience of the tourist is more or less deep.

Thus, those who share a common cultural identity in relation to the destination visited, that is, tourists who share the cultural identity of the Andalusian Renaissance, in the case of these cities, are much more emotionally involved with the place they visit.

Evaluation of the attributes of the destination

In the questionnaire, which served as the basis for this investigation, a question

was incorporated with different items that sought to collect the assessment of certain tourist attributes of the destination visited in order to detect strengths and points of improvement (Table 4). The valuation of some of these attributes is not as high as is the degree of general satisfaction since they are very specific aspects in which both personal and social factors come into play. The Cronbach's alpha coefficient (0.826) of the scale reveals a meritorious internal consistency since the critical level (p) associated with Friedman's statistic χ^2 (1,906,008) is less than 0.001, which makes it possible to contrast that the means of the elements are not the same.

Table 3. Perception of the historical heritage of tourists visiting the cities of Ubeda and Baeza

Perception	Origin of the tourist			H-Kruskal Wallis	
	Andalusía (average)	Rest of Spain (average)	Rest of the world (average)	χ^2	Sig.
My visit to the historical heritage of the city moved me	3.70	3.68	3.53	0.649	< 0.723
During my visit I felt as part of the heritage	2.96	2.95	2.38	20.327	< 0.000
My visit to the historical heritage of the city made me feel good	4.20	3.97	4.01	3.883	< 0.143
My visit to the historical heritage of the city has contributed to my education	3.71	3.77	3.94	4.721	< 0.094

Table 4. Valuation of the attributes of the destination

Dimensions and Attributes			Value	Ranking
Services	Average (3.561)	Diversity and quality of local gastronomy	3.76	8
		Service and quality of tourist accommodation	3.63	11
		Hospitality of residents	4.07	4
		Service and quality of restaurants and bars	3.83	6
		Opportunity to purchase traditional craftwork and food	3.66	10
		Service and quality of tourist guides	3.45	12
		Supplementary leisure offer	2.53	15
Historical and monumental heritage	Average (3.955)	Beauty of the city	4.36	2
		Monuments and art conservation	4.23	3
		The city's wealth of monuments and history	4.41	1
		Tourist information	3.69	9
		Accessibility to emblematic buildings and monuments	3.08	13
Infrastructures	Average (3.464)	Cleanliness and maintenance of the city	3.79	7
		Public transport services	2.71	14
		Citizen security	3.89	5

The set of attributes of these two cities were grouped into three dimensions: Services, Historical and Monumental Heritage, and Infrastructure. The analysis provides an indicator of the importance that travellers attach to the different attributes

of the cities of Úbeda and Baeza as tourist destinations. Among the attributes that contribute to the satisfaction of the tourist and the image of the destination, "the monumental and historical richness of the city", "the beauty of the city" and "the conservation of art and monuments" stand out. All these attributes belong to the dimension called Historical and Monumental Heritage. Among the attributes that confer a lower competitive advantage to the destination, and that logically it is necessary to work to improve the image of both cities as a tourist destination, the "complementary leisure offer" and the "public transport services" stand out. The analysis by segments reveals, once again, that the valuation is higher among the tourists who have a greater cultural motivation, that is to say, the segments of cultural tourists and patrimonial tourists (Table 5). This conclusion reinforces the recommendation to the enhancement of the cities of Úbeda and Baeza as cultural destinations.

Table 5. Analysis of the tourist attributes of the destination divided by segments

Dimensions	Tourist Clusters				Kruskal Wallis	
	alternative (Average)	Cultural (Average)	Emotional (Average)	Heritage (Average)	χ^2	Sig.
Services	3.12^(*)	3.69^(*)	3.48	3.56	34.220	<0.000
Historical and monumental heritage	3.52^(*)	4.08	3.81^(*)	4.01	146.464	<0.000
Infrastructures	3.30	3.58^(*)	3.38	3.38	36.193	<0.016
<i>(*) The values in italic type present significant differences in three of four of the means clusters. The Mann–Whitney U-test was applied to test for the significant differences between the different means.</i>						

CONCLUSIONS

The Renaissance heritage present in the cities of Úbeda and Baeza allowed them to be recognized as World Heritage by UNESCO in 2003. For this reason, it is necessary to carry out scientific research in order to provide both public and private managers with information that allows a better understanding about the behavior of visitors in a WHS, as these two Andalusian cities are. This will allow the design of strategies aimed at improving the management of a tourist destination. Consequently, understanding the behavior of visitors is essential for public administrations and the private sector to plan and implement these strategies appropriately. The typologies identified in this research are in line with the models of Poria et al. (2003) and Mckercher (2002): four different segments have been detected. Namely: alternative tourists, cultural tourists, emotional tourists and patrimonial tourists. Likewise, this research concludes that for a large group of travelers the visit to the cities of Úbeda and Baeza is related to their own history and/or culture, and they behave significantly differently from other tourists.

The main practical application of this research work is to contribute to the academic literature, offering tourism experiences in World Heritage cities and analyzing the existing links between visitors and the artistic and monumental heritage (or cultural heritage), as well as to contribute to knowledge about a heritage tourism in the region of Andalusia, with the objective of exploiting the tourist potential of Úbeda and Baeza as cultural destinations, in a sector that every day becomes more competitive in order to attract international tourists (Carvache et al., 2018).

In this sense, it is necessary to adopt actions aimed at improving the less valued attributes, infrastructure and public services in those cities. The main limitation of this investigation is in the temporary period in which this field work was carried out.

Therefore, it is suggested to extend the research to tourism reached in the cities of Úbeda and Baeza during all the months of the year. As a future line of research, we recommend strengthening research that focuses on other WHS in Spain. Paragraph: use this for the first paragraph in a section, or to continue after an extract.

REFERENCES

- Adie, B.A., & Hall, C.M., (2017), Who visits world heritage? A comparative analysis of three cultural sites, in *Journal of heritage tourism*, 12 (1), 67-80.
- Al-Rousan, R., Mustafa, M., Almasri, E., & Bala'awi, F., (2019), Measuring holiday satisfaction of American tourists visiting the dead sea in Jordan, in *GeoJournal of Tourism and Geosites*, 24 (1), 48–59.
- Antón, C., Camarero, C., & Laguna-García, M., (2017), Towards a new approach of destination loyalty drivers: satisfaction, visit intensity and tourist motivation, in *Current issues in tourism*, 20 (3), 238–260.
- Beerli, A., & Martín, J.D., (2004), Tourists' characteristics and the perceived image of tourist destinations: a quantitative analysis—a case study of lanzarote, spain, in *Tourism management*, 25 (5), 623-636.
- Bright, C.F., & Carter, P., (2016), Who are they? Visitors to louisiana's river road plantations, in *Journal of heritage tourism*, 11 (3), 262-274.
- Bruner, E.M. (1996), Tourism in ghana: the representation of slavery and the return of the black diaspora, in *American anthropologist*, 98, 290-304.
- Carvache-Franco, M., Carvache-Franco, O., Carvache-Franco, W., Villagómez Buele, C., & Arteaga Peñafiel, M., (2018), The Tourist Demand from the Perspective Of The Motivation, Assessment And Satisfaction In A Sun And Beach Destination: The Manta Case, Ecuador, in *GeoJournal of Tourism and Geosites*, 22 (2), 561–572.
- Chandralal, L., & Valenzuela, F., (2013). Exploring memorable tourism experiences: antecedents and behavioural outcomes, in *Journal of Economics, business and management*, 1 (2), 177-181.
- Chen, G., & Huang, S., (2017), Towards typology approach an improved to segmenting cultural tourists, in *International journal of tourism research*, 20 (2), 247-255.
- Cheung, S.C.H., (1996), The meanings of a heritage trail in hong kong, in *Annals of tourism research*, 26 (3), 570-588.
- Chi, C.G.Q., & Qu, H., (2008), Examining the structural relationships of destination image. Tourist satisfaction and destination loyalty: an integrated approach, in *Tourism management*, 29 (4), 624-636.
- Correia, A., Kozak, M., & Ferradeira, J., (2013), From tourist motivations to tourist satisfaction, in *International journal of culture, tourism and hospitality research*, 7 (4), 411-424.
- Cronbach, L.J., (1951), Coefficient alpha and the internal structure of tests, in *Psychometrika*, 16, 297-334.
- Crouch, G.I., (2011), Destination competitiveness: an analysis of determinant attributes, in *Journal of travel research*, 50 (27), 27-45.
- Driscoll, A., Lawson, R., & Niven, B., (1994), Measuring tourists' destination perceptions, in *Annals of tourism research*, 21 (3), 499-511.
- Dwyer, L., & Kim, C., (2003), Destination competitiveness: determinants and indicators, in *Current issues in tourism*, 6 (5), 369-414.
- Fields, K., (2002), Demand for the gastronomy tourism product. motivational factors. In A. M. Hjalager & G. Richards (Eds.), *Tourism and gastronomy* (pp. 36-50). Londres: Routledge.
- Finn, M., Elliott-White, M., & Walton, M., (2000), *Tourism and leisure research methods: data collection, analysis and interpretation*, London: Pearson Education.
- Huh, J., Uysal, M., & McCleary, K., (2006), Cultural/heritage destinations: tourist satisfaction and market segmentation, in *Journal of hospitality & leisure marketing*, 14 (3), 81-99.
- Kim, A.K., & Brown, G., (2012), Understanding the relationships between perceived travel experiences, overall satisfaction, and destination loyalty, in *Anatolia*, 23 (3), 328-347.
- Kim, J.H., (2014), The antecedents of memorable tourism experiences: the development of a scale to measure the destination attributes associated with memorable experiences, in *Tourism management*, 44, 34-45.
- Kruskal, W.H., & Wallis, W.A., (1952), Use of ranks in one-criterion variance analysis, in *Journal of the American statistical association*, 47 (260), 583–621.
- Lew, A.A. (1987), A framework for tourist attraction research, in *Annals of tourism research*, 14, 553-575.
- Mann, H.B., & Whitney, D.R., (1947), On a test of whether one of two random variables is stochastically larger than the other, in *The Annals of mathematical statistics*, 50-60.

- McKercher, B., (2002), Towards a classification of cultural tourists, in *International journal of tourism research*, 4, 29-32.
- McKercher, B., & du Cros, H., (2003), Testing a cultural tourism typology, in *International journal of tourism research*, 5 (1), 45-58.
- Nguyen, T.H.H., & Cheung, C., (2014), The classification of heritage visitors: a case of hue city Vietnam, in *Journal of heritage tourism*, 9 (1), 35-50.
- Nyaupane, G.P., & Andereck, K.L., (2014), Visitors to cultural heritage attractions: an activity-based integrated typology, in *Tourism culture & communication*, 14 (1), 17-26.
- Ozdemir, B., Aksu, A., Etchivar, R., Çizel, B., Çizel, R.B., & Içigen, E.T., (2012), Relationships among tourist profile, satisfaction and destination loyalty: examining empirical evidences in Antalya region of Turkey, in *Journal of hospitality marketing & management*, 21 (5), 506-540.
- Poria, Y., Butler, R., & Airey, D., (2003), The core of heritage tourism, in *Annals of tourism research*, 30, 238-254.
- Poria, Y., Reichel, A., & Biran, A., (2006), Heritage site management. Motivations and expectations, in *Annals of tourism research*, 33, 162-178.
- Poria, Y., Reichel, A., & Cohen, R., (2013), Tourists perceptions of world heritage site and its designation, in *Tourism management*, 35, 272-274.
- Prayag, G., (2008), Image, satisfaction and loyalty-the case of cape town, in *Anatolia*, 19 (2), 205-224.
- Ramires, A., Bradao, F., & Sousa, A.C., (2016), Motivation-based cluster analysis of international tourists visiting a world heritage city: the case of Porto, Portugal, in *Journal of destination marketing & management*, 8, 49-60.
- Remoaldo, P.C., Vareiro, L., Ribeiro, J.C., & Santos, J.F., (2014), Does gender affect visiting a world heritage site?, in *Visitor studies*, 17 (1), 89-106.
- Ribaudó, G., & Figini, P., (2016), The puzzle of tourism demand at destinations hosting UNESCO world heritage sites: an analysis of tourism flows for Italy, in *Journal of travel research*, 56 (4), 521-542.
- Saipradist, A., & Staiff, R., (2007), Crossing the cultural divide: western visitors and interpretation at Ayutthaya world heritage site. Thailand, in *Journal of heritage tourism*, 2 (3), 211-224.
- Silberberg, T., (1995), Cultural tourism and business opportunities for museums and heritage sites, in *Tourism management*, 16 (5), 361-365.
- Su, M.M., & Wall, G., (2011), Chinese research on world heritage tourism, in *Asia Pacific Journal of tourism research*, 16 (1), 75-88.
- Tung, V.W.S., & Ritchie, J.R.B., (2011), Exploring the essence of memorable tourism experiences, in *Annals of tourism research*, 38 (4), 1367-1386.
- Urry, J., (1990), *The tourist gaze: leisure and travel in contemporary societies*, Londres: Sage.
- Vong, L.T.N., & Ung, A., (2012), Exploring critical factors of Macau's heritage tourism: what heritage tourists are looking for when visiting the city's iconic heritage site, in *Asia Pacific journal of tourism research*, 17 (3), 231-245.
- *** Chancellery of Economy and Knowledge (2016). Hotel occupation rate survey. Cartography and Statistics Institute of Andalucía. Government of Andalucía.

Submitted:
05.04.2019

Revised:
24.09.2019

Accepted and published online
26.09.2019

TRANSFORMATION OF THE TOURISM SECTOR IN SOUTH AFRICA: A POSSIBLE GROWTH STIMULANT?

Diane ABRAHAMS*

University of Johannesburg, School of Tourism and Hospitality,
College of Business and Economics, South Africa, e-mail: dabrahams@uj.ac.za

Citation: Abrahams D. (2019). TRANSFORMATION OF THE TOURISM SECTOR IN SOUTH AFRICA: A POSSIBLE GROWTH STIMULANT? *GeoJournal of Tourism and Geosites*, 26(3), 821–830. <https://doi.org/10.30892/gtg.26312-400>

Abstract: Transformation is regarded as a national imperative in South Africa to deal with the inequalities of the past. Several pieces of legislation, policies and codes have been instituted to drive the process in the country. The question, however, remains whether the transformation process has resulted in a compliance culture or if indeed it is aspirational in driving change that is forward thinking, innovative and truly all inclusive. The travel and tourism sector is a sector that can provide access to the economy for many in terms of job creation and entrepreneurial opportunities. In South Africa, the National Tourism Sector Strategy (NTSS) which provides a blueprint for the tourism sector, places transformation at the centre of the changes required to grow the sector. The aim of the paper is to analyse the transformation processes underway in the tourism sector in South Africa and the impact that this may have had on promoting growth and access in the sector. In terms of international tourism scholarship this paper debates a distinctive dimension of the tourism sector in South Africa, namely the processes and progress around transformation.

Key words: transformation, tourism, inclusive development, economic development, South Africa

* * * * *

INTRODUCTION

Globally there is much debate around the concept and attainment of pathways of ‘inclusive and sustainable growth’. In the case of South Africa for inclusive and sustainable economic growth to take place it requires the making of an economy that meets the needs of all its people in an equitable manner (World Bank, 2018). Despite some success with a broad range of state policy, strategy and programme interventions aimed at overcoming economic disparities it remains that entrenched inequalities continue to characterise the South African economy. It is argued that such structural inequalities continue act as a deterrent to growth, economic development, employment creation and the eradication of poverty (DTI, 2015). These inequalities are defined in terms of racial and gender biases in the distribution of and access to wealth, income, skills

* Corresponding author

and employment. As a whole the National Treasury (2019) demonstrates that the South African economy continues to perform below its full potential and with its entrenched inequalities further marginalises the lives of those on the periphery (DTI, 2015).

For Turok & Visagie (2018) the concept of inclusive development is a seductive idea that a more dynamic and productive economy can go hand-in-hand with reduced inequality and exclusion. In the case of South Africa, a stagnant economy plagued by high levels of unemployment and growing levels of inequality makes this notion of inclusive development more challenging and elusive. Transformation of the economy will demand more than a compliance culture and the kind of innovation that will result in visible changes to improve the lives of the majority of South Africans. Since 2014 South Africa has seen a marked decline in economic growth with a technical recession recorded during the first half of 2018 (RSA, 2018; National Treasury, 2019). The country's Inaugural Jobs Summit in 2018 rightfully placed the urgent need to address joblessness and the stimulation of greater participation in the economy at the forefront. Redress is an important tool to transform an economy in which the majority of the population under apartheid were purposefully restricted from meaningful participation in the mainstream economy. The South African government's comprehensive policies and strategy around Broad Based Black Economic Empowerment (BBBEE) is the vehicle that has this transformative imperative for dealing with the apartheid legacy.

The tourism sector in South Africa is viewed by national government as a critical sector for the transformation of the national economy (Rogerson, 2004a; Nyazema, 2013; National Treasury, 2019). In addition, national government considers that the labour-absorptive tourism sector has great potential for further job creation and enterprise development – especially for small, medium and micro-enterprises (SMMEs) - which in turn will address the distressingly high levels of unemployment. However, it is argued in order for the tourism sector to grow and contribute positively to economic growth and employment targets that issues around access and transformation need to be addressed. Several recent papers have examined questions around 'access' and inclusion into the tourism economy of entrepreneurs from disadvantaged groups under apartheid (Adinolfi et al., 2018; Harilal & Nyikana, 2019; Rogerson & Rogerson, 2019a, 2019b). The aim of this paper is extend this scholarship by analysing the transformation processes underway in the tourism sector in South Africa. In particular, the analysis focuses on the impact that this may have had on promoting growth and access in the sector and explores whether the transformation policies and strategies have had any meaningful impact and change through the engagement of key stakeholders in the sector.

HISTORICAL CONTEXT TO TRANSFORMATION INITIATIVES IN SOUTH AFRICA

Across the international experience several countries have implemented strategies similar to those recently enacted in South Africa in order to address its transformation objectives. Indeed, it is evident that in terms of the policies of B-BBEE South Africa has derived its learning from several global cases on the implementation of affirmative action policies (Jain et al., 2003; Jain et al., 2012; Nyazema, 2013). Indeed, several countries, including the United States of America, India, Malaysia, Canada, Australia and Brazil have faced similar challenges of racial, ethnic or gender discrimination, socio-economic inequality and implemented policies to deal with such inequalities (Cahn, 2002; Crosby, 2004; Sowell, 2004; Telles, 2004; Kellough, 2006; Nyazema, 2013).

The promotion of the SMME economy was identified as an important vehicle for achieving transformation objectives by the national government after South Africa's democratic transition in 1994 (Rogerson, 2004b). In 1995, a national strategy for the

development and promotion of small business in South Africa was tabled in Parliament. The creation of new black-owned and black-controlled enterprises was seen as a key component of the strategy. The National Small Business Act was introduced in 1996 to provide an enabling environment for small, medium and micro-enterprises (SMMEs) and to establish several institutions to provide financial and other support to entrepreneurs.

These new institutions - Khula and Ntsika - targeted substantial proportions of their programmes at black entrepreneurs. In 1997, government issued a Green Paper on public sector procurement reform (Rogerson, 2004b). This policy document recognised that government, as the largest buyer of goods and services in the economy, had the responsibility to leverage this purchasing power in support of its economic policy objectives of broad-based black economic empowerment, small enterprise development, and labour-intensive construction (DTI, 2001). In 1998 further important pieces of legislation were enacted to address the objectives for broad-based black economic empowerment. These included, amongst others, the Competition Act, 1998, which aimed to expand the numbers of historically disadvantaged persons with an ownership stake in the economy. The Act allows for exemptions from the provisions on anti-competitive practices where such practices promote the ability of black-owned and -controlled enterprises to become competitive (DTI, 2001). The Employment Equity Act (1998) was another an important piece of legislation that outlawed all forms of unfair discrimination at work and required all enterprises employing more than fifty employees to take affirmative action to bring about a representative spread of designated groups in all occupations and organisational levels within defined time periods (DTI, 2001).

In addition, the National Empowerment Fund (NEF), a trust established in 1998 to hold equity stakes in state-owned enterprises and other private enterprises on behalf of historically disadvantaged persons. The NEF Corporation, established in terms of the NEF Act, 1998, was tasked to provide historically disadvantaged persons with the opportunity to both directly and indirectly acquire shares; encourage and promote savings, investment and meaningful economic participation by historically disadvantaged persons; and, to promote and support business ventures pioneered and run by historically disadvantaged persons (DTI, 2001). Government provided financial support in various form over the years in support of BEE. Enterprise support was provided through agencies such as Ntsika and Khula initially- later the Small Enterprise Development Agency (SEDA) as well as the Industrial Development Corporation (IDC). Other support was offered through the Land Bank, Development Bank of Southern Africa and special funds such as the Isibaya Fund and the Umsombomvu Youth Fund (DTI, 2001).

DEFINING BROAD-BASED BLACK ECONOMIC EMPOWERMENT

At the outset of South Africa's policies for BBEE was the critical issue of definition. The core challenge in defining black economic empowerment was to find the appropriate balance between on the one hand a very broad definition and on the other hand an overly narrow one. If BEE was defined too broadly it would be equated with economic development and transformation in general, which is commensurate with the totality of government's programme of reconstruction and development. Nevertheless, if BEE were defined too narrowly it would be limited to a set of transactions about transferring corporate assets from white to black ownership (DTI, 2015).

It is for this reason that the South African government defines BEE as an integrated and coherent socio-economic process that directly contributes to the economic transformation of South Africa and brings about significant increases in the numbers of black people that manage, own and control the country's economy, as well as significant decreases in income inequalities (Republic of South Africa, 2004). The main purpose of

Black Economic Empowerment is to ensure the following: (i) a substantial increase in the number of black people who have ownership and control of existing and new enterprises; (ii) a significant increase in the number of new black enterprises, black-empowered enterprises and black-engendered enterprises; (iii) a significant increase in number of black people in executive and senior management of enterprises; (iv) increased ownership of land and other productive assets, improved access to infrastructure, increased acquisition of skills, and increased participation in productive economic activities; Increased income levels of black persons and a reduction of income inequalities between and within race groups (DTI, 2001). The aim of government was then to measure the progress towards achieving these objectives. To this end several policy instruments were put in place and government encouraged partnerships with the private sector in order to accelerate BEE. The introduction of BEE Codes of Practice, Balanced Scorecard and the BEE Advisory Council were all tools to measure the progress of this important transformation aspect. The aim of the scorecard, which set a number of measurable targets, was to track progress in terms of several critical indicators, inter alia, (i) direct empowerment through ownership and control of enterprises and assets; (ii) human resource development and employment equity; and (iii) indirect empowerment through preferential procurement and enterprise development. The scorecard further allowed for government departments, state-owned enterprises, and other public agencies, to align their own procurement practices in support of BEE (DTI, 2001).

Notwithstanding the significance of transformation for the South African economy the existing literature on the topic remains relatively limited and is mainly concentrated upon political debates (Southall, 2007; Fauconnier & Mathur-Helm, 2008; Tangri & Southall, 2008). Specific industry experiences for example in the mining, agriculture and banking sector have been documented (Booyens, 2007). The critics of B-BEE argue that it has dealt black entrepreneurship a fatal blow and instead that it has created a small Black elite (Kruger, 2011). A review on the impact of BEE on the performance of South African businesses, revealed that perceptions are mostly negative with few (white-owned) companies seeing any benefits in terms of inter alia global competitiveness, service quality, financials, or production performance (Kruger, 2011). Luiz (2002) contends that it should not be the State that takes the lead role in enabling growth of small businesses in South Africa but rather the country's capable and established large private sector.

The only concern highlighted is that large firms choose to form linkages with SMMEs solely for cosmetic purposes and to improve their BEE credentials. Accordingly, there is therefore no real transformation taking place. Overall, there is recorded a widespread mistrust between the public and private sector in South Africa. Turok & Visagie (2018) looked at the kind of trade-offs that will be needed for true transformation and for inclusive development to take place in the country. Booyens (2011) suggested that SMMEs tend to not form strong upward linkages with larger firms, thus denying opportunities for development and recommended encouraging government to grow the 'knowledge networks'. In one of the few studies examining transformation in the tourism and hospitality sector. Nyazema (2013) indicated that less than 25% of hotels in South Africa purchased products and services from small black suppliers. Hotel group policy influenced procurement decisions in nearly 80 per cent of establishments. The factors influencing the low investment in assisting and growing black enterprises included hotel general managers' lack of confidence in the capacity and ability of small black enterprises to supply required goods and services. From the extant findings around transformation it appears that the objective of inclusive growth might be elusive.

Overall, Turok & Visagie (2018) argue that for inclusive development it is necessary to combine different kinds of enterprising activities with the sharing of resources and

expertise. Inclusive development is viewed as the key to transforming the economy and it is about social processes and the dynamics of change – not simply about distributional outcomes (Turok & Visagie, 2018). Of critical importance is the need to recognise the role of human agency in transformation. People will shape the change and their experiences can contribute to socio-economic development. This said, the question remains whether it is possible to reform or transform an economy without undermining its existence (Turok & Visagie, 2018). There is indeed a fine balance between expanding opportunities and steering the economy along a specific development trajectory – so that it becomes both more equitable and inclusive over time (Turok & Visagie, 2018).

A core question arises about who is responsible for this – government and/or private sector? Public and private sector complementarities may be the way to move forward on this but the relationship building to deal with the mistrust could hinder progress. It is against this backdrop of national debates around the meaning and directions of economic transformation in South Africa that attention turns in the next section of material to explore in detail the specific issues surrounding the tourism sector. As has been highlighted in South Africa's national tourism strategy, the sector of tourism is viewed as embodying great potential to assist in dealing with the large scale unemployment; could assist in driving the SMME development as well as providing opportunities for youth employment as well as entrepreneurs (Department of Tourism, 2018).

BLACK ECONOMIC EMPOWERMENT AND TOURISM

The beginnings of transformation measures in South Africa's tourism sector must be traced back to 2003 when the South African government promulgated the Broad-Based Black Economic Empowerment Act No. 53 to establish a legislative framework for the promotion of Black Economic Empowerment in the country (Republic of South Africa, 2004). The Act made provision for the development of the Codes of Good Practice and establishment of the Sector Charters. One of the first Sector Charters was the Tourism B-BBEE Charter which was developed in 2005 and signed as a commitment by all stakeholders in the tourism sector for the empowerment, transformation and collaboration to ensure that the opportunities and benefits of tourism are also extended to Black South Africans who previously were not allowed under apartheid to participate as entrepreneurs in the mainstream tourism economy (NDT, 2005). In May 2009, the Tourism B-BBEE Sector Code was gazetted with the further purpose of promoting the increased broad-based and effective participation of black people in the economy.

The legislative enforcement of the transformation agenda continued. In October 2013 all sector Charter Councils were required to align and gazette their specific Sector Codes under Section nine (9) of the B-BBEE Amendment Act No. 46 of 2013. To this end, for the tourism sector, the Tourism B-BBEE Charter Council gazetted the Amended Tourism B-BBEE Sector Code in line with the Amended Generic Codes of Good Practice in November 2015. The compliance targets of the Tourism Code (as amended) have been revised in consultation with stakeholders in the tourism sector.

The implementation of these codes is monitored by the Tourism BEE Charter Council but the actual impact of transformation of the tourism sector is yet to be realised. During 2019 a newly elected Tourism BEE Charter Council was appointed by the Minister of Tourism. Two main challenges face the tourism sector in South Africa, namely, (i) the need to become more globally competitive; and (ii) the need to include black people in the tourism sector (DTI, 2015). There is broad recognition by the South African government that the two challenges are interlinked. The commitment to transformation and empowerment is emphasized in the Amended Broad Based Black Economic Empowerment Codes 2015 which were issued by the National Department of

Trade & Industry (DTI, 2015). Addressing these issues will not only result in the growth of the tourism sector but the overall expansion of the South African economy.

In the Amended Codes the focus is issues of on Ownership, Management Control, Skills Development, Enterprise and Supplier Development as well as Socio-Economic Development (DTI, 2015). The National Tourism Sector Strategy (NTSS) is a further statement of the importance of tourism to drive growth and employment in South Africa. The NTSS was reviewed 2015 and core to the revisions is the transformation of the sector (Department of Tourism, 2018). It is acknowledged that without this committed drive to broaden the base and benefits of the tourism sector, generally the tourism benefits often do not filter down to poor communities or bring about economic development and the structure of South Africa's tourism economy will continues to be dominated by a small group of large, mostly white-owned tourism organisations (see Rogerson, 2005). South Africa's national Department of Tourism has commissioned several studies on the sub sectors of the tourism industry - realizing that the pace of change and inclusion was slow (see Rogerson & Rogerson, 2019a, 2019b).

The Broad Based Black Economic Empowerment policy is the national government's response to accelerate the inclusion into economic activity of black people who were previously disadvantaged. The pace of BBBEE implementation in the private sector, including the tourism sector, is regarded as slow and needs to accelerate. The Amended Tourism B-BBEE Sector Code applies to all enterprises within the Tourism Sector and all parts of the value chain in that sector, inter alia: accommodation (hotels, guest houses, resort properties and timeshare, game lodges, backpackers and hostels and bed and breakfast (B&B's); hospitality & related services (restaurants and conference venues that are not attached to hotels, professional catering); attractions; casinos; consulting and professional services; travel and related services (including tour wholesalers, tour operators, travel agents, tourist guides, car rental companies and coach operators) (Department of Tourism, 2016). The 5 elements in B-BBEE scorecard which impact tourism enterprises are as follows:

- (i) Ownership;
- (ii) Management Control;
- (iii) Skills Development;
- (iv) Enterprise and supplier development; and
- (v) Socio-economic development.

Table 1. B-BBEE Recognition Levels (Data source: Department of Tourism, 2016)

B- BBEE Status	Qualification	Recognition Level
Level One Contributor	100 points on the Scorecard	135%
Level Two Contributor	95 but <100 points on the Scorecard	125%
Level Three Contributor	90 but <95 points on the Scorecard	110%
Level Four Contributor	80 but <90 points on the Scorecard	100%
Level Five Contributor	75 but <80 points on the Scorecard	80%
Level Six Contributor	70 but <75 points on the Scorecard	60%
Level Seven Contributor	55 but <70 points on the Scorecard	50%
Level Eight Contributor	40 but <55 points on the Scorecard	10%
Non-Compliant Contributor	40 points on the Scorecard	0%

The three priority elements with the highest weighting in the scorecard are ownership, where the sub-minimum is 40% of net value; skills development and enterprise development. Large enterprises have to comply with three of these priority elements and qualifying small enterprises with two of the three priority elements. Based on

their overall performance of the entity during verification, a B-BBEE status with a corresponding B-BEE recognition level will be given to the entity (Department of Tourism, 2016). Table 1 provides full details of classification of enterprises by B-BBEE status.

The process of verification of tourism enterprises for B-BBEE compliance is performed by a Verification Professional of a Verification Agency. The B-BBEE Verification Professional Regulator is appointed by the Minister of Trade and Industry and is accredited for tourism (NDT, 2016). In addition there is a Tourism B-BEE Charter Council to monitor transformation and compliance with the codes. The Council is appointed by the Minister of Tourism and represents the different relevant constituencies in tourism such as large and small enterprises, tourism associations, academics, labour and civil society. The primary roles of the Council are the following:

1. Provide guidance on sector specific matters effecting B-BBEE in entities within the sector;
2. Compile reports on the status of B-BBEE within the sector; and
3. Monitor the implementation of the Amended Tourism B-BBEE Sector Code (Department of Tourism, 2016).

Given the regulation and monitoring processes that are in place, the question is what would a transformed tourism industry look like in South Africa Saunders (2018) argues that it would be one in which most enterprises across the spectrum are black-owned and that in all enterprises black people feature strongly at all levels including the Board and executive, management, supervisory levels as well as at skilled and unskilled levels. The spectrum of tourism establishments includes small, medium and large enterprises; rural as well as urban enterprises; budget, midmarket as well as luxury enterprises and those enterprises that serve domestic and/or international markets; in other words all the sub-sectors of the South African tourism industry (Saunders, 2018).

A transformed sector would be one in which communities are included and the benefits of tourism growth flow to marginalised and adjacent communities. In addressing a Tourism Leadership dialogue Saunders (2018) noted that a transformed sector is “when we stop counting and measuring, then we will know we got there”. This said, Khumalo (2019) maintains business in South Africa essentially reacts to regulation and not to prompts to ‘do the right thing’. Furthermore Khumalo (2019) notes that regulators are getting smarter about empowerment and that the amendments to the B-BBEE codes where the notion was that big companies would essentially obtain level 1 or level 2 status because of their black shareholding, as instead seen regulators getting smarter about B-BBEE. The amendments to the B-BBEE codes also sends the wrong message that successful black people have no part to play in empowering other black people (Khumalo, 2019). An important clause in the amended B-BEE codes is where large corporations will be allowed to earn 1.2 times the procurement points if they spend with businesses that are more than 51% black-owned (Khumalo, 2019). This bodes well for transformation as it gives black business a competitive edge that would aid in addressing the racial exclusion which is still in evidence in the South African economy (World Bank, 2018).

The ideal of a transformed tourism sector is one that would emphasise inclusivity and empowerment in every dimension. In order to achieve the desired outcome of a transformed sector certain critical issues need to be addressed by those in leadership in the sector. The two critical issues are ownership (sustained and successful) and skills (real and relevant). For ownership matters to be addressed in the sector attention has to be given to (i) access to markets and distribution; (ii) access to finance; (iii) reduction of red tape and, (iv) innovation (Saunders, 2018). In terms of skills, the focus needs to be on skills that are relevant in terms of the market needs; skills that ensure employability; and where skills development takes place through youth employment programmes with

appropriate apprenticeships and internships that would aid work place experience. Further, the focus on skills should also be on both quantity and quality of skills in the sector as well as the type of skill (Saunders, 2018).

Finally, inclusivity in the South African tourism sector would translate into increasing the involvement of black people as customers, from all income groups, and being able to book, access, feel comfortable and enjoy a tourism product that meets their needs in all sub-sectors of the industry (Saunders, 2018).

The question is whether transformation therefore, with all that has been said around skills, inclusivity, empowerment and opportunity, indeed be a stimulant for growth in the tourism sector? It is implied that the above discussed aspects of change can aid the tourism sector to grow to its full potential as they would result in more participants owning and using the products of tourism. This, however, remains to be seen as transformation continues at a slow pace in the country despite the plethora of amendments made to codes and regulations in order to catalyse transformation.

Critics of B-BBEE assert that it brings about only marginal change which is at the expense of economic growth and further that it places additional costs and regulation on business (Khumalo, 2019). The recent amendments to the B-BBEE codes have embraced aspects of skills development, enterprise and supplier development and thereby the notion of change beyond redistribution and indeed changes aimed at stimulating economic activity through increasing the South African economy's productive capacity and nurturing entrepreneurship (Khumalo, 2019).

The current status on transformation shows that there is need for breakthrough strategy for compliance. Procurement patterns in the private sector show limited transformation and there is therefore an urgent need to review the model for measuring corporate compliance. It is encouraging that large corporations can now issue a large five year contract to an SME, provide it with development support and enjoy full compliance benefits (Khumalo, 2019). The most recent B-BBEE amendments recognise that corporations are now able to claim B-BEE points for the development support that they provide to small businesses even if that business grows into a large business during that period. Finally, it is widely acknowledged that in order to accelerate transformation government needs itself to drastically improve its own procurement spend and payments made to SMMEs (World Bank, 2018; National Treasury, 2019).

The overall policy focus remains on Small, Medium and Microenterprises (SMMEs) and yet it has been shown that the linkages these have with big business in the value chain remains limited (Adinolfi et al., 2018). Going forward it is evident that the role of government as an enabler and facilitator of economic development versus its role as regulator for compliance needs to clarification (Department of Tourism, 2017). Further, it has been recommended that government and the private sector should establish a fund through contributions from Enterprise & Supplier Development (ESD) and Socio-Economic (SED) elements to finance new entrants into the market, including existing black businesses for expansions (NDT, 2017). Innovation, and training remain important issues also for the future growth of the sector most especially in the wake of new technology and industry disruptors such as Airbnb (Department of Tourism, 2017).

CONCLUSION

In terms of international tourism scholarship this paper analyses a distinctive dimension of tourism in South Africa, namely the debates, processes and progress around transformation. Arguably, there is still a long way to go both in terms of transforming the country's tourism sector and of growing it to its full potential. It is evident that current practices surrounding transformation appear mostly about measuring compliance and

that this results in limited overall change in the sector despite the push with legislation and for monitoring compliance requirements. The B-BEE Council is tasked to deal with those companies that do not comply with the Codes. It can be stated that private sector organisations, like the Tourism Business Council of South Africa, need to play a stronger lead role – together with their members – in improving the pace of transformation of the sector as this would, in turn, grow the size and opportunities within it. In addition, there is a definite need to broaden the awareness of industry stakeholders that the sector is more sustainable if more people are empowered and included. For transformation to be successful it is evident there is a need for both a willing heart and mind and that as much as compliance is important in that it will assist in fast tracking the much-needed change, the afore-mentioned will go a long way in effecting more sustainable and impactful changes in the sector. In terms of contemporary debates about the national economy tourism is viewed as a ‘game changer’ as it can assist with youth unemployment and provide a range of entrepreneurial opportunities (National Treasury, 2019).

With a supportive enabling environment the tourism sector can expand to its full potential and assist to address the core socio-economic challenges that the South African economy currently faces. The South African adage of to ‘BEE or not to BEE’ – is clearly no longer the question, as sustainable black economic empowerment is the core to the changes required for the sector to grow. The question that does, however, remain is rather how the broader benefits and impact of B-BEE can help expand the sector and to grow the economy. This issue needs further research from tourism scholars as national government continues to strive for more inclusive and equitable development.

Aknowlegments

An earlier version of this paper was presented at the International Geographical Union Conference, Quebec City, August 2018. Thanks go to the University of Johannesburg for funding and to Skye Norfolk for editorial inputs.

REFERENCES

- Adinolfi, M.C., Jacobs, M., & Tichaawa, T.M. (2018). Unpacking Factors Limiting and Promoting Black-Owned SMMes to Participate Actively Within the Tourism Value Chain in South Africa. *Africa Insight*, 48 (3), 88 -104.
- Booyens, L. (2007). Barriers to Employment Equity Implementation and Retention of Blacks in Management in South Africa. *South African Journal of Labour Relations*, 31(1), 47-71
- Booyens, I. (2011). Are Small, Medium, and Micro-sized Enterprises Engines of Innovation? The Reality in South Africa. *Science and Public Policy*, 38(1), 67-78.
- Cahn, S.M. (2002). Ed. *The affirmative action debate*. New York: Routledge.
- Crosby, F.J. (2004). *Affirmative action is dead: Long live affirmative action*. New Haven: Yale University Press.
- Fauconnier, A. & Marthur-Helm, B. (2008). Black economic empowerment in the South African mining industry: A case study of Exxaro Limited. *South African Journal of Business Management*, 39(4), 1-14.
- Jain, H.C., Sloane, P.J. & Horwitz, F.M. (2003). *Employment equity and affirmative action: An international comparison*. New York: Sharpe Inc.
- Jain, H.C., Horwitz, F. & Wilkin, C.L. (2012). Employment equity in Canada and South Africa: A comparative review. *The International Journal of Human Resource Management*, 23(1), 1-17.
- Harilal, V. & Nyikana, S. (2019) Factors Inhibiting Large Enterprises From Establishing Sustainable Linkages With Black-Owned SMMes in South Africa. *African Journal of Hospitality, Tourism and Leisure*, 8 (3), 1-14.
- Kellough, J.E. (2006). *Understanding affirmative action: Politics, discrimination and the search for justice*. Washington: Georgetown University Press.
- Kruger, L.P. (2011). The Impact of Black Economic Empowerment (BEE) on South African Business: Focusing on the Dimensions of Business Performance. *Southern African Business Review*, 15(3), 207-233
- Khumalo, A. (2019). A Sign that Regulators are Getting Smarter About Empowerment. *Business Times*, 16 June.
- Luiz, J. (2002). Small Business Development, Entrepreneurship and Expanding the Business Sector in a Developing Economy: The Case of South Africa. *Journal of Applied Business Research*, 18(2), 53-68.

- Nyazema, M.M. (2013). *Developing an Empowerment Framework for Broad-based Black Economic Empowerment in the Hotel Industry of South Africa*. PhD dissertation (Business Management and Administration), Stellenbosch University, Stellenbosch.
- Rogerson, C.M. (2004a). Black economic empowerment in South African tourism. In C.M. Rogerson & G. Visser, (Eds.), *Tourism and Development Issues in Contemporary South Africa*, Pretoria: Africa Institute of South Africa.
- Rogerson, C.M. (2004b). The Impact of the South African Government's SMME Programmes: A Ten Year Review. *Development Southern Africa*, 21, 765-784.
- Rogerson, C.M. (2005). Unpacking Tourism SMMEs in South Africa: Structure, Support Needs and Policy Response. *Development Southern Africa*, 22, 623-642.
- Rogerson, C.M. & Rogerson, J.M. (2019a). Public Procurement, State Assets and Inclusive Tourism: South African Debates. *GeoJournal of Tourism and Geosites*, 26 (3), 686-700.
- Rogerson, C.M. & Rogerson, J.M. (2019b). Tourism, Local Economic Development and Inclusion: Evidence from Overstrand Local Municipality, South Africa. *GeoJournal of Tourism and Geosites*, 25 (2), 293-308.
- Saunders, G. (2018). Presentation made at Tourism Leadership Dialogue on Transformation, Johannesburg.
- Southall, R. (2007). Ten Propositions About Black Economic Empowerment in South Africa. *Review of African Political Economy*, 34 (111), 67-84.
- Sowell, T. (2004). *Affirmative action around the world: An empirical study*. London: Yale University Press.
- Tangri, R. & Southall, R. (2008). The politics of black economic empowerment in South Africa. *Journal of Southern African Studies*, 34(3), 699-716.
- Telles, E.E. (2004). *Race in another America: The significance of skin color in Brazil*. Princeton: Princeton University Press.
- Turok, I. & Visagie, J. (2018). *Inclusive Urban Development in South Africa: What Does It Mean and How Can it Be Measured?* Brighton, England: University of Sussex Institute of Development Studies Working Paper 512.
- *** Department of Tourism. (2013). *National Tourism Sector Strategy*. Pretoria: Department of Tourism.
- *** Department of Tourism. (2016). *Easy Guide for the Amended Tourism B-BBEE Sector Code*. Pretoria: Department of Tourism.
- *** Department of Tourism. (2017). *Draft Resolutions of the Tourism Transformation Summit*. Pretoria: Department of Tourism.
- *** Department of Tourism. (2018). *Revised National Tourism Sector Strategy*. Pretoria: Department of Tourism.
- *** Department of Trade and Industry (DTI). (2001) *South Africa's Economic Transformation: Strategy for Broad Based Black Economic Empowerment*. Pretoria: Department of Trade and Industry
- *** Department of Trade and Industry. (2015). *Broad-Based Black Economic Empowerment Act no.53 of 2003*. Pretoria: Government Printer.
- *** National Treasury. (2019). *Economic Transformation, Inclusive Growth and Competitiveness: Towards An Economic Strategy for South Africa*. Pretoria: National Treasury.
- *** Republic of South Africa (RSA). (2004). *Broad-Based Black Economic Empowerment Act*. Government Gazette # 25899. Cape Town, 1-6.
- *** Republic of South Africa. (2018). Presidential Jobs Summit Framework Agreement, South Africa.
- *** World Bank, (2018). *An Incomplete Transition: Overcoming the Legacy of Exclusion in South Africa*. Report No. 125838-ZA. Washington DC: The World Bank.

Submitted:
06.07.2019

Revised:
24.09.2019

Accepted and published online
26.09.2019

COMPARATIVE CONTENT ANALYSIS OF THE WEBSITES OF GASTRONOMY CITIES REWARDED BY UNESCO CREATIVE CITIES NETWORK

Sedat BÜTÜN*

Dumlupınar University, Kütahya Vocational School of Social Sciences,
Tourism and Travel Services Kütahya, Turkey, e-mail: sedat.butun@dpu.edu.tr

Sibel ÖNÇEL

Anadolu University, Faculty of Tourism,
26470 Eskisehir, Turkey, e-mail: sguler@anadolu.edu.tr

Citation: Bütün, S., & Öncel, S. (2019). COMPARATIVE CONTENT ANALYSIS OF THE WEBSITES OF GASTRONOMY CITIES REWARDED BY UNESCO CREATIVE CITIES NETWORK. *GeoJournal of Tourism and Geosites*, 26(3), 831–848. <https://doi.org/10.30892/gtg.26313-401>

Abstract : This study aims to evaluate the written and visual materials in the web sites of 26 cities that joined the Creative Cities Network under the category of gastronomy. Comparative content analysis was used for the purpose of the study to evaluate the official websites of gastronomy-themed cities. The websites of the cities were examined in terms of design, functionality, communication and interaction features, destination promotion and gastronomy promotion. The findings revealed that gastronomy cities, which accept creativity as a strategic factor in economic social and cultural sustainable development missions, do not have convenient and adequate contents. Further the results showed that the websites of these cities were insufficient in terms of design and functionality. It was also found that the promotion of the destinations was inadequate compared to gastronomical values. Conclusions were drawn on the basis of findings.

Key words: UNESCO, creative cities network, gastronomy city, destination promotion, web content analysis

* * * * *

INTRODUCTION

The industries related to creativity make significant contributions to social and cultural developments of the cities and countries. These industries, which are based on individual creativity, skills, and competence, and which have the potential to generate income and employment through production or use of intellectual property, are at the core of cultural and economic strategies on local and regional scale (DCMS 2000; Taylor, 2006). Although there is no consensus in literature regarding the limits of creative

* Corresponding author

industries or areas (Bakhshi et al., 2013; CCS, 2013; Hartley, 2005; Hesmondhalgh, 2002), it is observed that the industries that produce genuine goods and services with imagination and innovative ideas are associated with creativity (UNCTAD, 2008). Unlike all other classifications regarding creative industries, gastronomy was regarded as a field of creativity for the first time within the scope of UNESCO's Creative Cities Network and cities with authentic gastronomy traditions were rewarded as "Creative City of Gastronomy". Considered as a cultural heritage, the tradition of gastronomy provides significant opportunities to cities in terms of international recognition and enhancing destination's image. Gastronomy is also effective on tourists' travel motivations and has direct or indirect influence on their travel decisions. In this sense, as a type of alternative tourism, gastronomy provides great opportunities to cities. Because of the international structure and severe competition in tourism sector, the destinations should promote themselves in the international arena in the most effective way possible. At this point, internet and websites become the most suitable platforms for promotion. Internet is one of the most commonly used sources of information throughout the world, and it is one of the most significant sources that people use to obtain information regarding the destinations before traveling. Thus, the internet may be considered a significant source for promotion and marketing activities that are necessary for cities with gastronomy tradition to use gastronomy as a tool of their economic, social and cultural development.

In parallel with the increasing importance of the internet and websites, the number of studies regarding website contents has also increased. The first study in tourism literature regarding the assessment of websites was conducted by Murphy et al. (1996). It is observed that the number of subsequent website assessments with different measurements and approaches has also increased. The studies in literature are mostly about evaluation of hotels, travel agencies, destination marketers and travel websites (Schmidt et al., 2008; Ip et al., 2012; Escobar-Rodríguez & Carvajal-Trujillo, 2013; Ting et al., 2013; Leung et al., 2016; Salem & Čavlek, 2016; Atıf, 2018; Bayram & Yaylı, 2009; Choi et al., 2007; Kim et al., 2009; Chiou et al., 2011). However, the websites of gastronomy cities have not been examined yet. Therefore, this study aims to evaluate the written and visual materials in the web sites of cities entitled with 'Creative City of Gastronomy' award listed in the Creative Cities Network under the category of gastronomy. In these websites, especially the creativity and gastronomy identity of the destination is promoted. The results of the study has the potential to make suggestions regarding to what extent the gastronomy cities use their websites effectively.

LITERATURE REVIEW

The Concept of Creative Industries

The concept of creativity, which is characterized in various ways, can be defined as the ability to show up with innovative, remarkable, and valuable ideas and works (Boden, 2009). The term "creativity" is related to authenticity, imagination, novelty, inspiration, and invention capability. It refers to new ideas and the use of these ideas for production of genuine artistic-cultural products, functional creations, scientific inventions, and technological innovations (UNCTAD, 2008). Although creativity may take place in production processes and products of tourism or any other industry, this would not make the entire industry as a creative industry. According to the generally accepted definition of the Department of Digital, Culture, Media & Sport (DCMS) in United Kingdom, the creative industries are defined as *"those industries, which have their origin in individual creativity, skill and talent and which have a potential for wealth and job creation through the generation and exploitation of intellectual property"* (DCMS, 2001; CCS,

2013). On the other hand, United Nations Conference on Trade and Development (UNCTAD) has defined the creative industries in a series of reports on creative industries published in 2008 and 2010. Accordingly, the creative industries are the industries (1) where creativity and intellectual capital are used as primary inputs in creation, production and distribution of goods and services; (2) which include a set of knowledge-based activities that focus on generating income not only through arts, but also through trade and intellectual property rights; (3) which comprise tangible goods with creative content, economic value, and market objectives, and intangible intellectual or artistic services; (4) which are positioned at the intersection point of the artisans, services and industrial sectors; and (5) which create a new dynamic sector in global trade (Boix et al., 2011; Marinova & Borza, 2013). There are problems and discussions regarding the definition of creative industries (CCS, 2013) and it is very difficult to distinguish them from other industries due to their close economic relations with each other. Nevertheless, it is observed that some classifications are used to materialize the definition and scope of creative industries. The models suggested for classification of creative industries are not considered completely wrong or right. These models should be regarded as different ways of interpreting the characteristics of creative production (UNCTAD, 2008).

According to the model in Creative Industries Mapping Document published by DCMS in 1998 (cited by Roodhouse 2006), the creative industries include 13 creative sectors: advertising, architecture, arts and antiques markets, crafts, design, designer fashion, film and video, interactive leisure software, music, performing arts, publishing, software and computer services, television and radio (DCMS, 2001; CCS, 2013).

Table 1. DCMS and UNESCO's Classification regarding Fields/Industries of Creativity
(Data source: DCMS Creative Industries Mapping Document and Creative Cities Network Catalog.)

Creative Industries according to DCMS	Creative Industries according to UNESCO
Advertising	Crafts and folk arts
Architecture	Design
Arts and antiques market	Film
Crafts	Literature
Design	Music
Designer fashion	Media arts
Film and video	Gastronomy
Interactive leisure software	
Music	
Performing arts	
Publishing	
Software and computer services	
Television and radio	

Together with UNESCO Creative Cities Network, a new classification has entered into the literature for creative industries in 2004. Although UNESCO's creative industry concept shares similarities with DCMS's creative industries model, UNESCO has included the theme of gastronomy in its creative industries model and that is what distinguishes it from similar classifications. There are seven creative industries in UNESCO's model. These are: crafts and folk arts, design, film, media arts, literature, music, and gastronomy (<https://en.unesco.org/creative-cities/content/about-us>).

UNESCO Creative Cities Network and Gastronomy Cities

UNESCO Creative Cities Network (UCCN) was created in 2004 in order to encourage cooperation among cities, which consider (define) creativity as a strategic

factor for their sustainable urban development (<https://en.unesco.org/creative-cities/content/about-us>). Cooperation and sharing knowledge and experiences are critical for using creativity as a leverage in the process of urban development. In this sense, UNESCO's Creative Cities Network offers unparalleled opportunities to the cities. This program offers opportunities for peer learning processes and collaborative projects in order to fully capitalize their creative assets and use this as a basis for building sustainable inclusive, and balanced development in economic cultural and social terms (<https://en.unesco.org/creative-cities/content/why-creativity-why-cities>).

The cities that accept undertakings, such as supporting creativity and culture industries, collaborating with the other cities within the network and developing cooperation, stimulating participation in cultural life and integrating culture into urban development plans can join these networks. By joining the Creative Cities Network, the cities aim the following in general: (1) to promote their cultural assets in the international area, (2) to turn creativity into one of the main factors of local economic and social development, (3) to mutually share knowledge with other similar cities, (4) to improve their local capacities, and (5) to improve innovation and creativity through exchange of knowledge, experience, and technological know-how (<https://en.unesco.org/creative-cities/content/why-creativity-why-cities>). UNESCO Creative Cities Network includes seven creative fields as Crafts and Folk Arts, Design, Film, Gastronomy, Literature, Media Arts, and Music. There are 180 cities from 72 countries within the network that comprises these seven fields of creativity (Creative Cities Network Catalogue, 2018; <https://en.unesco.org/creative-cities/creative-cities-map>).

The cities, which are considered critical forces behind the economy, have both physical and nonphysical cultural assets. Since it has nonphysical features, gastronomy as a cultural asset has been included within the Creative Cities Network by UNESCO as one of the creative industries that is a determinant of urban economic development. Since it has local characteristics, and it indicates a unique and rich tradition that is shaped according to the geographical, natural, historical, and climatic conditions of the cities, gastronomy is regarded as a significant field of creativity for cities. Upon acceptance of gastronomy among UNESCO Creative Cities Network as a field of creativity, it is observed that numerous cities have begun to accept gastronomy as a creative industry that would contribute to their social, cultural, and economic development (Xiaomin, 2017). The following criteria must be met in order to be identified and awarded as a Creative City of Gastronomy by UNESCO Creative Cities Network (Creative Cities Brochure, 2018):

- Well-developed gastronomy culture that is characteristic of the urban center and/or region,
 - Vibrant gastronomy community with numerous traditional restaurants and/or chefs,
 - Endogenous ingredients used in traditional cooking,
 - Local know-how, traditional culinary practices and methods of cooking that have survived industrial/technological advancement,
 - Traditional food markets and traditional food industry,
 - Tradition of hosting gastronomic festivals, awards, contests and other broadly-targeted means of recognition,
 - Respect for the environment and promotion of sustainable local products,
 - Nurturing of public appreciation, promotion of nutrition in educational institutions and inclusion of biodiversity conservation programs in cooking schools curricula.

Since the city of Popayan (Colombia) has first joined in gastronomy themed creative cities network in 2005, the number of cities within the network has reached 26 up to end of 2018 (<https://en.unesco.org/creative-cities/>).

Table 2. UNESCO Creative Cities Network, Gastronomy Cities
(Data source: adapted from <https://en.unesco.org/creative-cities/>)

City	Year joined	Country	Language
Popayán	2005	Colombia	Spanish
Chengdu	2010	China	Chinese
Östersund	2010	Sweden	Swedish
Jeonju	2012	South Africa	Korean
Zahlé	2013	Lebanon	Arabic
Florianopolis	2014	Brasil	Spanish
Shunde	2014	China	Chinese
Tsuruoka	2014	Japan	Japanese
Belém	2015	Brasil	Spanish
Bergen	2015	Norway	Norwegian
Burgos	2015	Spain	Spanish
Denia	2015	Spain	Spanish
Ensenada	2015	Mexico	Spanish
Gaziantep	2015	Turkey	Turkish
Parma	2015	Italy	Italian
Phuket	2015	Tailand	Thai
Rasht	2015	Iran	Farsi
Tuscon	2015	USA	English
Alba	2017	Italy	Italian
Buenaventura	2017	Colombia	Spanish
Cochabamba	2017	Bolivia	Spanish
Hatay	2017	Turkey	Turkish
Macao	2017	SAR* (China)	Chinese
Panama	2017	Panama	Spanish
Paraty	2017	Brasil	Spanish
San Antonio	2017	USA	English

* A Special Administrative Region of People's Republic of China

Promotion of Gastronomy Cities and the Internet

The cities that consider gastronomy within the scope of creative industries, and as an important asset that accelerates social, cultural, and economic developments, would take a great opportunity to promote themselves to the world after joining UNESCO Creative Cities Network and becoming gastronomy cities. As such, gastronomy should be considered as the result of current political, social or economic needs. In this sense, such a cultural (gastronomic) heritage must be understood as an approach of understanding the past at present (Matlovičová & Husarová 2017, p. 7). In this regard, the key links of the past with the present through the preserved tangible and intangible relics of the environment is the essence of heritage marketing. Heritage marketing have the ability to transcend time and allow the past to exist in the present. It also plays an important role in shaping the presence (Matlovičová & Husarová 2017, p. 7). Consequently, the cities and regions can create and develop their image, increase their recognition, and promote their gastronomy identity on international level by utilizing internet technologies efficiently to increase tourism income of the local communities and the country and seize this opportunity.

It is known that many tourists seek to get more information about destinations that they are curious about or interested in tourism industry, which also includes gastronomy (Lee et al., 2006) and that they refer to different sources of information to make the right decision when it comes to choosing a destination (Ho et al., 2012). Sources and range of information influence the tourists' intentions to visit a destination (Dey & Sarma, 2010).

In this regard, it is necessary to consider the concept of branding and image. The image of the destination should be perceived as multidimensional concept consisting of functional, emotional, relational and strategic elements which together create a unique set of associations connected with the place in the minds of the public (Matlovičová & Kormaníková 2014, p. 2). There are numerous studies about the ways the tourists use the internet as a source of information, and the ways the service providers utilize the internet to influence the decisions of the tourists (Araña et al., 2015; Buhalis & Law, 2008; Ho et al., 2012; Litvin et al., 2008; Pan & Fesenmaier, 2006; Xiang & Gretzel, 2010).

While it is evident that the number of tourists who prefer to get more information about their travels through the internet and who make decisions according to these data has been increasing, it is also observed that the internet is used by the tourism industry as an excellent platform that can convey direct information about the product, service, cost, and time (Burger et al., 1997). Since they can both provide information and represent the cultural heritage of the destination online, the websites play a critical role in selection of the destination (Pan & Fesenmaier, 2000) and they are frequently used by the potential tourists to obtain information and to develop a route (Lee, 2017; Ukpadi & Karjaluoto, 2017; Tang-Taye & Standing, 2016; Garau, 2014; Chiou et al., 2011).

The internet not only functions as a source of information for tourists, it is also a source of information for all other tourism enterprises, such as travel agencies, tour operators, and hotels (Özdemir, 2007). Thus, the internet, which has become a popular source of information and communication throughout the world, can host and convey all information about a destination. Therefore, it serves as a significant instrument of promotion for destinations. In order to promote a destination efficiently through websites, which play a significant role in direct promotion of a destination and creating an image and a brand (Sarı & Kozak, 2005), the websites should be designed, and contents should be created in line with predetermined objectives and strategies (Palmer, 2002). The content and the form of presentation are very important to convince potential tourists (Law et al., 2004). Destination's image can be created and better positioned by developing up-to-date websites that are rich in information and visual contents (Chung et al., 2015). The destinations that are well-promoted in their websites can attract more tourists (Alcantara-Pilar et al., 2017; Garau, 2017; Horng & Tsai, 2010; Han & Mills, 2006).

The marketing of the destination also consists of the promotion of gastronomic values, and most destinations promote their dishes on their websites. Therefore, as suggested by Matlovičová and Pompura (2013, p. 130) it is possible to approach the food consumption and related activities as a means or an inevitable part of a tourist journey or as a target of a tourist journey when composing a tourist product and a marketing strategy. As such, destination marketing planners should consider the difference when promoting the gastronomic values in the destination websites.

METHODOLOGY

Content analysis method is used in this study, which is conducted to evaluate and analyze the official websites of gastronomy-themed cities that have been named 'Creative City of Gastronomy' within the scope of UNESCO Creative Cities Network. Content analysis is defined as an observational research method that used to systematically evaluate the real and symbolic content of all recorded forms of communication (Hall & Valentin 2005). Content analysis, which is commonly used in social sciences, is regarded as a significant analysis technique that also includes web communications (Keskin & Çilingir, 2010). This study comprises the websites of 26 cities that have met the criteria for UNESCO Creative Cities Network before 01.01.2019 and that have been announced in

the official website of UNESCO as Gastronomy Cities. The official websites' URLs of 14 gastronomy cities were found in UNESCO's official website; the websites' URLs of 2 gastronomy cities were found via internet search engines. The remaining 10 cities do not have a 'Gastronomy City', 'Creative City', or 'Creative City of Gastronomy' themed website. In some tourism-themed websites of local governments, cities and/or countries, these cities are mentioned as gastronomy cities. However, it is observed that they do not have a solely gastronomy-themed website, and this was confirmed by local sources.

Thus, 10 cities (their websites) were excluded. On the other hand, since the gastronomy cities are located in different locations and countries, the official languages used in those websites are also different. Therefore, the research is limited to those gastronomy cities with websites in English language. With the assumption that the contents of the websites may eventually change in time since some information may be added, removed, or updated, the research is limited with the contents of websites published between 01.01.2019 and 13.01.2019. As a result, the written and visual contents of websites of 13 gastronomy cities were analyzed and compared.

The literature was reviewed in order to determine the criteria that will be used for content analysis. The studies regarding design, functionality, communication, interaction, information presentation, and contents of the websites were utilized (Baloğlu & Pekcan, 2006; Zhou & DeSantis, 2005; Tanrısevdi & Duran, 2011; Baggio, 2003; Cox & Dale, 2001; Gibson et al., 2003). In addition, in determining the evaluation criteria to be used for the analysis of gastronomy-themed websites within the scope of this study, specific evaluation criteria were created by using the expectations of UNESCO regarding the gastronomy culture of the city, which are listed in the guideline for candidate Gastronomy Cities. 4 academic members who are experts in their field were consulted to test the evaluation criteria in terms of contents and consistency, and the evaluation criteria took their final form after necessary corrections.

Table 3. The Websites with Analyzed Contents

Gastronomy Cities	URLs
Jeonju	http://unesco.jeonju.go.kr/eng/
Florianopolis	http://floripacreativecity.com/index.php?lang=en
Tsuruoka	http://english.creative-tsuruoka.jp/
Belém	http://creativecity.belem.pa.gov.br/en/
Bergen	https://bergengastronomy.com/
Burgos	http://burgoslab.com/?lang=en
Ensenada	https://www.ensenadacreativa.mx/
Gaziantep	http://www.gastroantep.com.tr/eng/
Parma	http://www.parmacityofgastronomy.it/en/
Tucson	http://tucson.cityofgastronomy.org/
Alba	http://www.albacityofgastronomy.it/
Hatay	http://hataygastronomi.com/en/home-2
Macao	http://www.gastronomy.gov.mo/#home

Table 4. Evaluation Criteria for Websites of Gastronomy Cities

1. Design and Functionality (1 point assigned for each item present, total range 0-12)

- 1.1. Homepage and menus
- 1.2. Accessibility to Homepage
- 1.3. Multi language options (1 more language in addition to mother language)
- 1.4. Multi language options (2 or more languages in addition to mother language)
- 1.5. Mobile compatibility

- 1.6. Full screen photograph on the homepage
- 1.7. Full screen video on the homepage
- 1.8. Sitemap
- 1.9. In-site search
- 1.10. In-site links
- 1.11. External links
- 1.12. Frequently asked questions

2. Communication and Interaction (1 point assigned for each item present, total range 0-10)

- 2.1. Online forum / blog
- 2.2. E-Bulletin membership
- 2.3. Communication form /e-mail
- 2.4. Contact informations
- 2.5. Media archive / press kit
- 2.6. Links to social media accounts
- 2.7. Facebook share button
- 2.8. Twitter share button
- 2.9. Other social media share buttons
- 2.10. Comment / like sections for contents

3. Destination Promotion (1 point assigned for each item present, total range 0-9)

- 3.1. Characteristics of the city
- 3.2. History of the city
- 3.3. Socio-cultural life
- 3.4. Transport
- 3.5. Climate
- 3.6. Accommodation
- 3.7. Tourist attractions
- 3.8. Travel and tour recommendations
- 3.9. Links to tourism enterprises

4. Gastronomy Promotion (1 point assigned for each item present, total range 0-18)

- 4.1. Gastronomy tradition
 - 4.2. Local products
 - 4.3. Sustainable agricultural practices
 - 4.4. Local manufacturers (suppliers)
 - 4.5. Food safety
 - 4.6. Food variety
 - 4.7. Beverage variety
 - 4.8. Menu
 - 4.9. Recipes
 - 4.10. Culinary techniques and the utensils used
 - 4.11. Gastronomy education
 - 4.12. Gastronomy tours
 - 4.13. Gastronomy events (festivals, conferences, contests, etc.)
 - 4.14. Local stakeholders (restaurants, workshops, ateliers, etc.)
 - 4.15. Organization
 - 4.16. Photo gallery
 - 4.17. Video gallery
 - 4.18. News
-

The websites within the scope of this study were visited, and checked in terms of whether each characteristic, statement, or content that were determined as evaluation

criteria were included in writing and/or visually. Whether the websites meet the relevant criteria was evaluated by checking the website evaluation form as 1 (available) and 0 (not available) and each characteristic and dimension score were calculated in accordance with the scoring system of Gibson et al. (2003). The 'Evaluation Criteria for the Websites of Gastronomy Cities' which includes 4 dimensions and 49 sub-features as shown in Table 4 were used for content analysis.

RESULTS AND DISCUSSIONS

Evaluation regarding Design and Functionality of Websites

The websites are analyzed as to what extent they meet the criteria regarding the sub-features on design and functionality. The number and percentage of websites that have each feature are shown in Table 5. Accordingly, 12 websites have accessible homepages. 12 websites (92.31%) have a second language in addition to its mother language; only one website offers three or more language options (7.69%).

Table 5. The criteria in design and functionality dimension
and the frequency of availability of these features on websites

Contents/Features	available		not available	
	N	%	N	%
1. Design and Functionality				
1.1. Homepage and menus	12	92,31	1	7,69
1.2. Accessibility to Homepage	12	92,31	1	7,69
1.3. Multi language options (mother language +1 language)	12	92,31	1	7,69
1.4. Multi language options (mother language +2 or more languages)	1	7,69	11	84,62
1.5. Mobile compatibility	10	76,92	3	23,08
1.6. Full screen photograph on the homepage	9	69,23	4	30,77
1.7. Full screen video on the homepage	4	30,77	9	69,23
1.8. Sitemap	1	7,69	12	92,31
1.9. In-site search	4	30,77	9	69,23
1.10. In-site links	1	7,69	12	92,31
1.11. External links	8	61,54	5	38,46
1.12. Frequently asked questions	1	7,69	12	92,31

The websites of 10 gastronomy cities (76.92%) have mobile compatibility, and the written and visual contents are resized for devices such as telephones and tablets. Considering the fact that today, the internet is not only accessible through computers, but the mobile devices are also commonly used, mobile compatibility becomes a significant issue in web design. Only 4 websites (30.77%) have in-site search option, which enables users to access information more easily and quickly.

Among all websites that preferred to have full screen visual images on their homepages, 9 websites included full screen photos, and 4 websites included full screen videos on their homepages. There are numerous local stakeholders and communities in these cities, which were awarded as gastronomy cities through the initiatives and projects of the government agencies or local governments. Nevertheless, there are websites (38.46%) that do not provide external links. Similarly, 92.31% of these websites do not provide in-site links, as well. Only one website has a Frequently Asked Questions section.

Evaluation of Websites' Power of Communication and Interaction

When these websites are evaluated in terms of their communication and interaction characteristics, it is observed that only a few websites meet the criteria

(Table 6). Contact information is available in 11 websites (84.62%). While 2 websites offer direct communication through an online form, 2 websites do not have any sort of contact information. Only 2 (15.38%) gastronomy city websites include a media archive or press kit section. One of the channels that media organizations and employees look to create their reports is websites. Having media contents in their websites can be very important for gastronomy cities that want to take part in written and visual media, and reach larger masses, however, it is observed that the contents of these websites are not sufficient. Social media is another instrument to reach larger masses and to strengthen communication with the users. Websites of 6 gastronomy cities (46.15%) give links to their social media accounts. Their websites allow them to share the contents (photographs, videos, menus, events, news, etc.) of their websites in their social media accounts. 4 websites have a Facebook share button, 3 websites have a Twitter share button, and 2 websites have share buttons for other social media accounts. 3 websites allow their users to like or comment on their website content.

Table 6. The criteria in communication and interaction dimension and the frequency of availability of these features on websites

Contents/Features	available		not available	
	N	%	N	%
2. Communication and Interaction				
2.1. Online forum / blog	2	15,38	11	84,62
2.2. E-Bulletin membership	2	15,38	11	84,62
2.3. Communication form /e-mail	11	84,62	2	15,38
2.4. Contact informations	2	15,38	11	84,62
2.5. Media archive / press kit	6	46,15	7	53,85
2.6. Links to social media accounts	4	30,77	9	69,23
2.7. Facebook share button	3	23,08	10	76,92
2.8. Twitter share button	2	15,38	11	84,62
2.9. Other social media share buttons	3	23,08	10	76,92
2.10. Comment / like sections for contents				

Table 7. The contents about destination promotion and the frequency of availability on websites

Contents/Features	available		not available	
	N	%	N	%
3. Destination Promotion				
3.1. Characteristics of the city	11	84,62	2	15,38
3.2. History of the city	5	38,46	8	61,54
3.3. Socio-cultural life	2	15,38	11	84,62
3.4. Transport	3	23,08	10	76,92
3.5. Climate	2	15,38	11	84,62
3.6. Accommodation	1	7,69	12	92,31
3.7. Tourist attractions	4	30,77	9	69,23
3.8. Travel and tour recommendations	3	23,08	10	76,92
3.9. Links to tourism enterprises	3	23,08	10	76,92

Evaluation of Contents related to Destination Promotion

The city's history, cultural and natural assets, and the local community are inseparable elements of gastronomy. Gastronomy culture, which emerges as creativity of the entire city and community, and awarded by UNESCO, allows cities to promote

themselves in the international tourism market and to create an image. In this respect, it is essential that the websites of gastronomy cities should include information regarding promotion of other touristic assets of the destination along with other information about gastronomy. The cities are promoted in 11 out of 13 websites (84.62%) and they include information about other characteristics of the cities. 2 websites do not have any information about the identity of the city. 5 websites include information about the history of the city, and only 2 websites include information about the socio-cultural life in the city. The websites offer limited information about transportation, climatic conditions, and accommodation in the city. 3 websites provide information about transportation, 2 websites provide information about the climate, and only 1 website provide information about accommodation. It is observed that 4 websites (30.77%) feature contents about tourist attractions, and 3 websites (23.08%) feature contents about travel and tour recommendations. 3 websites give external links to tourism enterprises independently from gastronomy communities and stakeholders. When the criteria for destination promotion are evaluated, it is observed that the majority of websites do not provide sufficient content about the destination promotion.

Evaluation of Contents related to Gastronomy Promotion

The contents of websites with their main themes being gastronomy, which are included within the scope of this study, were analyzed with regards to 18 sub-criteria determined under gastronomy promotion. Table 8 shows the number and the extent to which these websites meet each criteria or characteristic feature.

Table 8. The contents about gastronomy promotion and the frequency of availability on websites

Contents/Features	available		not available	
	N	%	N	%
4. Gastronomy Promotion				
4.1. Gastronomy tradition	11	84,62	2	15,38
4.2. Local products	10	76,92	3	23,08
4.3. Sustainable agricultural practices	2	15,38	11	84,62
4.4. Local manufacturers (suppliers)	6	46,15	7	53,85
4.5. Food safety	2	15,38	11	84,62
4.6. Food variety	8	61,54	5	38,46
4.7. Beverage variety	4	30,77	9	69,23
4.8. Menu	7	53,85	6	46,15
4.9. Recipes	2	15,38	11	84,62
4.10. Culinary techniques and the utensils used	1	7,69	12	92,31
4.11. Gastronomy education	5	38,46	8	61,54
4.12. Gastronomy tours	2	15,38	11	84,62
4.13. Gastronomy evets (festivals, confereces, contests, etc.)	9	69,23	4	30,77
4.14. Local stakeholders (restaurants, workshops, atelier, etc.)	7	53,85	6	46,15
4.15. Organization	6	46,15	7	53,85
4.16. Photo gallery	6	46,15	7	53,85
4.17. Video gallery	4	30,77	9	69,23
4.18. News	6	46,15	7	53,85

11 websites (84.62%) provide contents about a deep-rooted gastronomy tradition, which is one of UNESCO's criteria for gastronomy city candidates. Local products are significant assets to create a gastronomy tradition in a city. It is observed that the local products are promoted in 10 websites (76.92%). However, only 6 websites (46.15%)

provide information about local manufacturers (suppliers). Only 2 websites provide contents about sustainable agriculture practices and food safety. The majority of websites (84.62%) do not provide any information regarding these two aspects. It is observed that 8 websites address to promoted food variety and 4 websites address to promoted beverage variety. 7 websites share menus (53.85%), but the recipes are not shared at the same percentage. Only 2 websites give recipes of limited amount of local foods.

Culinary techniques and the utensils used in kitchen have a significant role in creation of gastronomy culture and tradition. However, there is only 1 website that provides information about culinary techniques and the utensils used. 5 websites (38.46%) provide information about gastronomy education and educational institutions, which are very important for protecting gastronomy culture, transferring these traditions to the next generations, and sustainability. 7 websites (53.85%) provide promotional information about local stakeholders, such as restaurants, manufacturing facilities, factories, workshops, and farms. Considering the fact that gastronomy is a travel motivation that has an increasing trend in tourism industry, promoting gastronomy-themed tours and events in websites could bring significant advantages for cities with regards to generating touristic demand. It is observed that 9 websites (69.23%) publish contents about gastronomy events, such as festivals, conferences, contests, etc. However, only 2 websites (15.38%) provide information about gastronomy tours within the city. All websites include more or less photos and/or videos; however, 6 websites (46.15%) include contents under the name of photo gallery, and 4 websites (30.77%) include contents under the name of video gallery. 6 websites provide gastronomy-themed news.

Content Analysis Scores and Comparison of Websites

In this content analysis, which was conducted under 4 dimensions and 49 criteria, the websites were given one point for each satisfied criterion, and dimension-based total scores of each website are calculated (Table 9). In Design and Functionality Dimension, which includes 12 criteria, the average score of the websites is calculated as 5.77.

Table 9. Websites' content analysis scores

	Design Funct.	Comm. Interact.	Dest. Promo.	Gastro. Promo.	Total Score
Jeonju	5	1	3	6	15
Florianópolis	3	0	0	1	4
Tsuruoka	4	1	3	10	18
Belém	7	0	1	8	16
Bergen	6	5	2	4	17
Burgos	5	2	0	1	8
Ensenada	4	4	1	3	12
Gaziantep	4	1	2	11	18
Parma	11	9	7	13	40
Tucson	6	5	3	11	25
Alba	5	2	1	7	15
Hatay	8	6	4	13	31
Macao	7	1	7	10	25
Mean score	5,77	2,85	2,62	7,53	18,77
Range	0-12	0-10	0-9	0-18	0-49

Considering the fact that the maximum score is 12, it is observed that 48.1% of the criteria are satisfied, and thus, it is concluded that the websites are not able to meet the desired design and functionality features. When the scores of gastronomy cities are evaluated individually, it is observed that the top three cities with highest scores in design and functionality are Parma (11), Hatay (8), and Macao (7). It is also observed that the website of Parma, which satisfied 11 out of 12 criteria, has higher level of design and functionality than the other websites. There are 10 criteria under Communication and Interaction Dimension. The average score is calculated as 2.85 in this dimension and it is observed that 28.5% of the evaluation criteria are satisfied. This percentage, which is calculated as the lowest among all dimensions shows that websites of (many) gastronomy cities are insufficient in terms of communication and interaction features.

When the scores of the cities are analyzed, it is observed that the websites of Parma, Hatay, Tucson, and Bergen have more communication and interaction features than the others. Parma meets 90% of these criteria with its 9 points of dimension score, and it is followed by Hatay with 6 points, and Bergen and Tucson with 5 points each. It is observed that the gastronomy websites of Belem, which failed to meet any of these criteria, and Jeonju, Tsuruoka, Gaziantep, and Macao, which could only meet 1 criterion each, do not have any communication and interaction features.

The extent to which the contents of these websites give place to destination promotion independently from their gastronomy identities have been analyzed based on 9 criteria. The average destination promotion score calculated for 13 websites is 2.62, and it is far below the maximum score of 9. The gastronomy cities should effectively use their gastronomy city identities and their websites to promote their destinations in the international arena. However, the research findings indicate that the 13 websites could only meet 29.1% of destination promotion criteria, and that they do not give place to destination promotion adequately. The websites of Parma and Macao, which share the highest dimension score with 7 points, differ from the other websites in terms of destination promotion and provide sufficient information.

Parma and Macao could meet 77.8% of the criteria. In Gastronomy Promotion Dimension, which has the most criteria (18) among the dimensions, the average score of all websites is 7.53. It may be concluded that this score, which represents 41.8% of possible maximum score 18, is very low in general for websites, for which the main themes are gastronomy and gastronomy cities. Parma and Hatay, which have contents regarding 13 criteria on their websites, satisfy 72.2% of total evaluation criteria; Gaziantep and Tucson consist of 11 and satisfy 61.1% of these criteria; and Tsuruoka and Macao consist of 10 and satisfy 55.6% of these gastronomy promotion criteria.

According to total content analysis scores of websites, which are calculated independently from the dimensions, the total average score of 13 websites is 18.77. It is also observed that 38.3% of all criteria are satisfied in this evaluation, where maximum score is 49. When the websites of gastronomy cities are analyzed individually, Parma is ranked first among all websites and satisfied 81.6% of all content analysis evaluation criteria. Hatay is ranked second with a total of 31 points and its website satisfied 63.3% of all evaluation criteria. Tucson and Macao followed Parma and Hatay with 25 points each, and their websites satisfied 51% of all evaluation criteria. The cities with lowest scores are Florianopolis (4), Burgos (8) and Ensenada (12).

Co-Evaluation of Content Analysis Scores and Visibilities of Websites of Gastronomy Cities in Internet Search Engines

Within the context of this study, the visibility of websites of gastronomy cities in internet search engines is also checked and co-evaluated with the content analysis

scores. The ratio of all internet searches between December 2017 and December 2018 are as follows: 92.21% Google, 2.39% Bing, 2.13% Yahoo, and 3.27% other search engines (<http://gs.statcounter.com/search-engine-market-share>). Thus, it is decided to use only Google, and the names of the cities were typed together with the statement city of gastronomy and searched on 11.01.2019 and visibility scores (the number provided by Google) were logged (Chart 1). As shown in Figure 1, a two-dimensional matrix was created by search engine visibility scores (x axis) and content analysis scores (y axis).

The average visibility of 13 cities is approximately 120.000, average score of content analysis is 18.77, and these are marked on x and y axis respectively to create 4 sections (windows) on the matrix and to make evaluations.

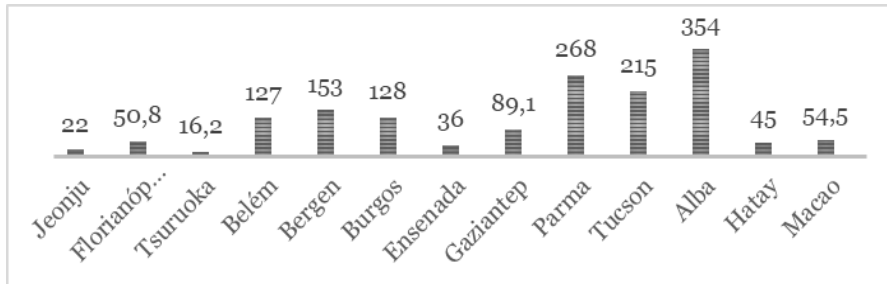


Chart 1. Search engine visibility of gastronomy cities (x1000)

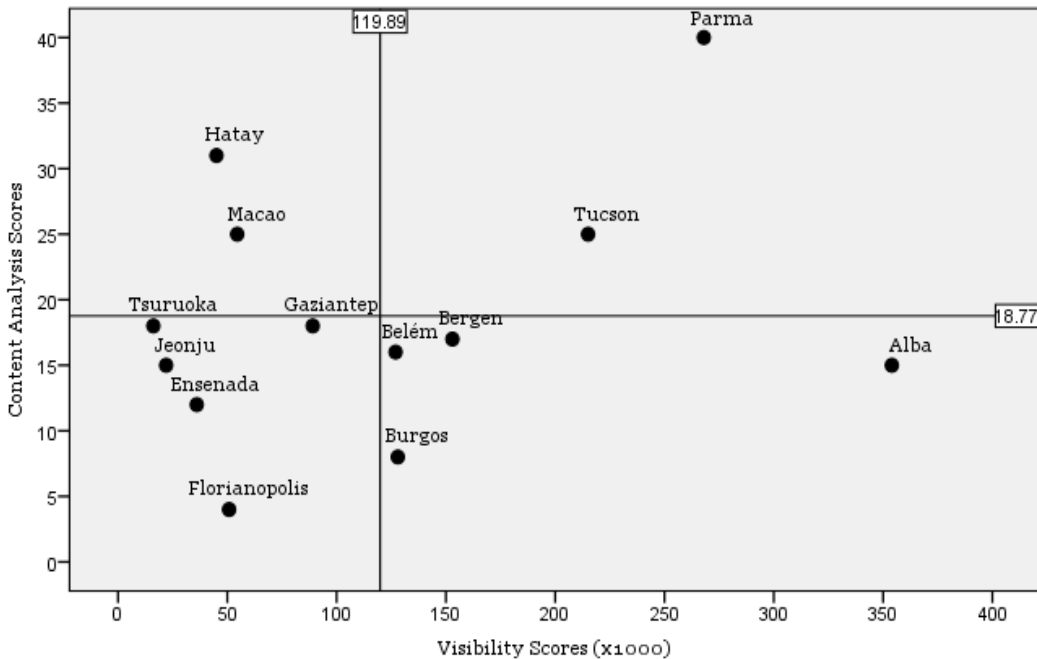


Figure 1. Co-Evaluation of Content Analysis Scores and Visibilities of Websites of Gastronomy Cities in Internet Search Engines

Parma and Tucson are the two cities above the average in terms of both website content analysis score and visibility score, and they have found the ideal place on the

matrix. Hatay and Macao have higher content analysis scores than the majority of other cities' websites with their website contents and the level of meeting the evaluation criteria. However, their internet search engine visibilities are quite low.

Alba, which has the highest visibility score, and Burgos, Belem, and Bergen, which also have above-average visibility scores, have higher number of search engine links. However, the content analysis scores of their websites are low, and they need to be increased. Jeonju, Tsuruoka, Gaziantep, Ensenada, and Florianopolis have lowest scores in terms of both visibility and website contents. It is observed that the content analysis scores of Tsuruoka and Gaziantep are very close to the average.

CONCLUSION

Gastronomy is one of the most important travel motivations and it is regarded as an increasing tourism trend; it provides economic, social, and cultural benefits for cities and local communities by contributing to the image, promotion, and marketing of various destinations. On the other hand, since UNESCO defined gastronomy as a field of creativity, and awarded the cities with deep-rooted gastronomy traditions as 'Creative City of Gastronomy', gastronomy has become a powerful instrument for promotion of the destinations. Gastronomy cities can promote themselves to the entire world through efficient use of the internet, which is one of the most significant sources that people look to get information about the destinations before they travel. The purpose of this study is to evaluate the websites of gastronomy cities through content analysis, and to reveal the level of competence of the website contents in terms of design, functionality, communication, interaction, destination promotion, and gastronomy promotion.

The results of content analysis indicate that the websites of the gastronomy cities that take place within UNESCO Creative Cities Network do not include sufficient amount of contents. According to the results of the research, the websites may be regarded as efficient in terms of design and functionality. However, in-site search option and frequently asked questions section should be included in order to make sure that the users can easily access the contents that they are interested. Only a few websites have these options. The websites were found ineffective in terms of communication and interaction features. Some websites do not even provide a contact information for users to communicate. The majority of websites do not offer communication and interaction instruments, such as communication forms, online forums, or e-bulletins. Only a few websites have contents for media communication, links to social media accounts, and the means to share contents in social media accounts. Gastronomy cities should strengthen their communication with the users who visit their websites.

It is observed that the websites do not efficiently promote their destinations independently from their gastronomy identity. In order to create a destination image, and to have a positive impact on destination choice processes of potential visitors, it is critical to promote all other attractions apart from the gastronomy culture. Thus, it should be considered that these websites are valuable platforms to promote a destination with its entirety. Contents related to the destination should be created and promoted on these websites in cooperation with local and national tourism offices.

When the contents regarding gastronomy promotion are analyzed, it is observed that the promotion level is relatively higher, however, not all websites include contents regarding sustainability, food safety, culinary techniques, utensils used, gastronomy tours, and gastronomy education. These contents, which distinguish gastronomy cities from the other cities, and which are related to the preconditions given by UNESCO to the candidate cities, should be emphasized more, and the gastronomy identity of the

city should be promoted in all aspects. This study reveals that the readily available sources for promotion and marketing particularly within the context of gastronomy are not utilized in full capacity since the criteria specified by UNESCO are not effectively used in these websites. Considering the fact that these websites are visited by people, who would like to get more information about these cities within the creative cities network of UNESCO, it is clear that these websites should be used more effectively.

This study has some limitations. One of these limitations is that the content analysis of these websites is limited to the online content found between January 1, and January 13, 2019. Since the design and contents of these websites may change in time, the results of the analysis may reveal different results in future studies. Another limitation is that this study only comprises the websites published in English. Websites in different languages may be analyzed in other studies. A similar study may be conducted on social media accounts of gastronomy cities. Considering the fact that potential tourists can also create contents or comment on existing contents on social media, the gastronomy cities, social media contents and user contents can be analyzed together.

REFERENCES

- Alcántara-Pilar, J. M., del Barrio-García, S., Crespo-Almendros, E., & Porcu, L. (2017). Toward an understanding of online information processing in e-tourism: does national culture matter? *Journal of Travel & Tourism Marketing*, 34(8), 1128-1142.
- Araña, J. E., León, C. J., Carballo, M. M., & Gil, S. M. (2015). Designing tourist information offices. The role of the human factor. *Journal of Travel Research*, 55(6), 764-773.
- Atif, Ö. (2018). Konaklama İşletmelerinin Web Sayfa Tasarımlarının Pazarlama Uygulamaları Açısından İncelenmesi: Eskişehir Örneği. *Journal of Turkish Tourism Research*, 2(1), 15-26.
- Baggio, R. (2003). A websites analysis of European tourism organizations. *Anatolia*, 14(2), 93-106.
- Bakhshi, H., Hargreaves, I., & Mateos-Garcia, J. (2013). A manifesto for the creative economy. London: National Endowment for Science, Technology and the Arts.
- Baloglu, S., Pekcan, Y. A. (2006). The website design and Internet site marketing practices of upscale and luxury hotels in Turkey, *Tourism Management*, 27(1), 171-176.
- Bayram, M., & YAYLI, A. (2009). Otel web sitelerinin içerik analizi yöntemiyle değerlendirilmesi. *Elektronik Sosyal Bilimler Dergisi*, 8(27), 347-379.
- Boden, M. A. (2009). Computer models of creativity. *AI Magazine*, 30(3), 23.
- Boix R., Lazzaretto L., Hervàs J.L., De Miguel B. (2011). Creative clusters in Europe: a microdata approach, New challenges for European Regions and Urban Areas in a Globalized world; 1-33.
- Buhalis, D., & Law, R. (2008). Progress in information technology and tourism management: 20 years on and 10 years after the Internet: The state of eTourism research. *Tourism Management*, 29(4), 609-623.
- Burger, F., Karoib, P., Pröll, B., Richtsfeld, R., Sighart, H. and Starck, H. (1997). TIS@WEB-database supported tourist information on the web. In A.M. Tjoa (Eds.) *Information and Communication Technologies in Tourism*, (pp.180-189). Wien: Springer-Verlag
- Chiou, W.C., Lin, C.C. and Perng, C. (2011), A strategic website evaluation of travel agencies, *Tourism Management*, Vol.32No.6, pp.1463-1473.
- Choi, S., Lehto, X. Y., & Morrison, A. M. (2007). Destination image representation on the web: Content analysis of Macau travel related websites. *Tourism Management*, 28(1), 118-129.
- Chung, N., Lee, H., Lee, S. J., & Koo, C. (2015). The influence of tourism website on tourists' behavior to determine destination selection: A case study of creative economy in Korea. *Technological Forecasting and Social Change*, 96, 130-143.
- Cox, J. ve Dale, B.G. (2002). Key Quality Factors in Web Site Design and Use, an Examination, *International Journal of Quality ve Reliability Management*, 19 (7), 862-888.
- Dey, B., & Sarma, M. K. (2010). Information source usage among motive-based segments of travelers to newly emerging tourist destinations, *Tourism Management*, 31(3), 341-344.
- Escobar-Rodríguez, T., & Carvajal-Trujillo, E. (2013). An evaluation of Spanish hotel websites: Informational vs. relational strategies. *International Journal of Hospitality Management*, 33, 228-239.
- Garau, C. (2014). Smart paths for advanced management of cultural heritage. *Regional Studies, Regional Science*, 1(1), 286-293.
- Garau, C. (2017). Emerging technologies and cultural tourism: Opportunities for a cultural urban tourism research agenda. In *Tourism in the City* (pp. 67-80). Springer, Cham.

- Gibson, R. K., Margolis, M., Resnick, D., & Ward, S. J. (2003). Election Campaigning on the WWW in the USA and UK: A Comparative Analysis. *Party Politics*, 9(1), 47-75.
- Hall, C ve Valentin, A. (2005) 'Content Analysis' Tourism Research Methods Integrating Theory with Practice (ed) Ritchie, B.W Burns, P. ve Palmer, C CABI Cambridge.
- Han, J. H., & Mills, J. E. (2006). Zero acquaintance benchmarking at travel destination websites: what is the first impression that national tourism organizations try to make? *International Journal of Tourism Research*, 8(6), 405-430.
- Hartley, J. (2005). Creative industries. Blackwell Publishing.
- Hesmondhalgh, D. (2002). The cultural industries. London: Sage.
- Ho, C., Lin, M., & Chen, H. (2012). Web users' behavioral patterns of tourism information search: From online to offline. *Tourism Management*, 33(6), 1468-1482.
- Hornig, J. S., & Tsai, C. T. S. (2010). Government websites for promoting East Asian culinary tourism: A cross-national analysis. *Tourism management*, 31(1), 74-85.
- Ip, C., Law, R., & Lee, H. A. (2012). The evaluation of hotel website functionality by fuzzy analytic hierarchy process. *Journal of Travel & Tourism Marketing*, 29(3), 263-278.
- Keskin, H., & Çilingir, Z. (2010). Web Sitelerinin Globalizasyonu Üzerine Büyük Global Amerikan Markalarına Yönelik Bir İçerik Analizi Uygulaması. *Eskişehir Osmangazi Üniversitesi İİBF Dergisi*, 5(2), 51-66.
- Kim, Y. H., Yuan, J., Goh, B. K., & Antun, J. M. (2009). Web marketing in food tourism: A content analysis of web sites in West Texas. *Journal of Culinary Science & Technology*, 7(1), 52-64.
- Law, R., Leung, K. & Wong, J. (2004). The Impact of The Internet on Travel Agencies. *International Journal of Contemporary Hospitality Management*, 16(2) 100-107.
- Lee, C. B. (2017). Qualitative analysis of cultural tourism websites of municipalities in Taiwan. *Information Technology for Development*, 1-16.
- Lee, G., Cai, L. & O'Leary A. J. (2006). WWW. Branding States. US: An Analysis of Brand-building Elements in the US State Tourism Websites. *Tourism Management*, 27(5), 815-828.
- Leung, D., Law, R., & Lee, H. A. (2016). A modified model for hotel website functionality evaluation. *Journal of travel & tourism marketing*, 33(9), 1268-1285.
- Litvin, S. W., Goldsmith, R. E., & Pan, B. (2008). Electronic word-of-mouth in hospitality and tourism management. *Tourism Management*, 29(3), 458-468.
- Marinova E., & Borza A. (2013). The Creative industries and New trends in the economic world. *Economia, Seria Management*, 16 (2); 327-332
- Matlovičová K., & Husárová M. (2017). Potential of the Heritage Marketing in Tourist Destinations Development. Cicva Castle Ruins Case Study (Heritage marketing a možnosti jeho využitia pri rozvoji turistickej destinácie. Pripadovka studia hradu Cicva). *Folia Geographica*, 59(1), 5-35.
- Matlovičová K., & Kormaníková J. (2014). City Brand-Image Associations Detection. Case Study of Prague. *SGEM International Multidisciplinary Scientific Conferences on Social Sciences and Arts, SGEM 2014, Psychology & Psychiatry, Sociology & Healthcare, Education, Conference Proceedings*, Volume II., Sociology and Healthcare, Albena, Bulgaria, 139-146.
- Matlovičová K., & Pompura M. (2013). The Culinary Tourism in Slovakia Case Study of the Traditional Local Sheep's Milk Products in the regions of Orava and Liptov. *GeoJournal of Tourism and Geosites*, 12(2), 129-144.
- Murphy J, Forrest EJ, Wotring CE, Brymer RA. (1996). Hotel management and marketing on the internet. *Cornell Hotel and Restaurant Administration Quarterly*, June, 70-82.
- Özdemir, G. (2007). Destinasyon Pazarlamasında İnternetin Rolü, *Journal of Yasar University* ,2(8), 889-898.
- Palmer, A. (2002). Destination branding and the web. In N. Morgan, A. Pritchard and R. Pride (Eds.) *Destination Branding: Creating the Unique Destination Proposition*, (pp. 186-197). Oxford: ButterworthHeinemann.
- Pan, B., & Fesenmaier, D. (2000). A typology of tourism-related web sites: Its theoretical background and implications. *Information Technology & Tourism*, 3(3), 155-166.
- Pan, B., & Fesenmaier, D. R. (2006). Online information search: Vacation planning process. *Annals of Tourism Research*, 33(3), 809-832.
- Roodhouse, S. (2006). The creative industries: definitions, quantification and practice. EISENBERG C. et al. (der.) içinde. *Cultural industries: The British experience in international perspective*. Berlin: Humboldt University, s. 13-32.
- Salem, I. E. B., & Čavlek, N. (2016). Evaluation of hotel website contents: existence-importance analysis. *Journal of Hospitality and Tourism Technology*, 7(4), 366-389.
- Sarı, Y., & Kozak, M. (2005). Turizm pazarlamasına internetin etkisi: destinasyon web siteleri için bir model önerisi. *Akdeniz İktisadi ve İdari Bilimler Fakültesi Dergisi*, 5(9), 248-271.
- Schmidt S, Cantalops AS, dos Santos CP. (2008). The characteristics of hotel websites and their implications for website effectiveness. *International Journal of Hospitality Management*, 27(4): 504-516.
- Tang-Taye, J. P., & Standing, C. (2016). Website translation and destination image marketing: A case study of Reunion Island. *Journal of hospitality & tourism research*, 40(5), 611-633.
- Tanrısevdi, A., & Duran, N. (2011). Comparative evaluation of the official destination websites from the perspective of customers. *Journal of Hospitality Marketing & Management*, 20(7), 740-765.

- Taylor, C.F. (2006). 'Beyond Advocacy: Developing an Evidence Base for regional Creative Industry Strategies' in *Cultural Trends*, 15(57) pp. 3-18.
- Ting, P. H., Wang, S. T., Bau, D. Y., & Chiang, M. L. (2013). Website evaluation of the top 100 hotels using advanced content analysis and eMICA model. *Cornell Hospitality Quarterly*, 54(3), 284-293.
- Ukpabi, D. C., & Karjaluoto, H. (2017). Consumers' acceptance of information and communications technology in tourism: A review. *Telematics and Informatics*, 34(5), 618-644.
- Xiang, Z., & Gretzel, U. (2010). Role of social media in online travel information search. *Tourism Management*, 31(2), 179-188.
- Xiaomin, C. (2017). City of Gastronomy of UNESCO Creative Cities Network: From International Criteria to Local Practice. *Social Systems Studies*, 55-67.
- Zhou, Q., & DeSantis, R. (2005). Usability issues in city tourism Web site design: a content analysis. In Professional Communication Conference, 2005. IPCC 2005. Proceedings. International (pp. 789-796). IEEE.
- *** Alba, Creative City of Gastronomy, <http://www.albacityofgastronomy.it/> accessed 01.01.2019.
- *** Belém, Creative City of Gastronomy, <http://creativitycity.belem.pa.gov.br/en/> accessed 03.01.2019.
- *** Bergen, Creative City of Gastronomy, <https://bergengastronomy.com/> accessed 07.01.2019.
- *** Burgos, Creative City of Gastronomy, <http://burgoslab.com/?lang=en> accessed 05.01.2019.
- *** CCS (2013) Classifying and measuring the creative industries. London: Creative and Cultural Skills.
- *** Creative Cities Network Catalogue (2018). https://en.unesco.org/creative-cities/sites/creative-cities/files/unesco_uccn_en_180530_final.pdf accessed 05.11.2018.
- *** Creative Cities Brochure (2018), http://www.unesco.org/new/fileadmin/MULTIMEDIA/HQ/CLT/pdf/Creative_cities_brochure_en.pdf accessed 05.11.2018.
- **** DCMS. (2001) Department of Culture Media and Sport, Creative industries mapping document <https://www.gov.uk/government/publications/creative-industries-mapping-documents-2001> accessed 12.12.2018.
- *** Ensenada, Creative City of Gastronomy, <https://www.ensenadacreativa.mx/> accessed 09.01.2019.
- *** Florianopolis, Creative City, <http://floripacreativitycity.com/index.php?lang=en> accessed 07.01.2019.
- *** Gaziantep, Creative City of Gastronomy, <http://www.gastroantep.com.tr/eng/> accessed 02.01.2019.
- *** Global Stats (Search Engine Market Share Statistics) <http://gs.statcounter.com/search-engine-market-share> accessed 11.01.2019.
- *** Hatay, Creative City of Gastronomy, <http://hataygastronomi.com/en/home-2> accessed 02.01.2019.
- *** Jeonju, Creative City of Gastronomy, <http://unesco.jeonju.go.kr/eng/> accessed 02.01.2019.
- *** Macao, Creative City of Gastronomy, <http://www.gastronomy.gov.mo/#home> accessed 04.01.2019.
- *** Parma, Creative City of Gastronomy, <http://www.parmacityofgastronomy.it/en/> accessed 01.01.2019.
- *** Tsuruoka, Creative City of Gastronomy, <http://english.creative-tsuruoka.jp/> accessed 06.01.2019.
- *** Tucson, Creative City of Gastronomy, <http://tucson.cityofgastronomy.org/> accessed 08.01.2019.
- *** UNCTAD (United Nations Conference on Trade and Development, 2008), https://unctad.org/en/Docs/ditc20082cer_en.pdf accessed 04.11.2018.
- <https://en.unesco.org/creative-cities/> accessed 03.11.2018.
- <https://en.unesco.org/creative-cities/content/about-us> accessed 05.11.2018.
- <https://en.unesco.org/creative-cities/content/why-creativity-why-cities> accessed 05.11.2018.
- <https://en.unesco.org/creative-cities/creative-cities-map> accessed 03.11.2018.

Submitted:
18.04.2019

Revised:
25.09.2019

Accepted and published online
27.09.2019

FESTIVAL TOURISM AS AN INSTRUMENT OF SUSTAINABLE LIVELIHOOD IN ESWATINI

Paul Nkemngu ACHA-ANYI *

Walter Sisulu University, Buffalo City – College Street Campus, Faculty of Business Science, Department of Tourism, Hospitality and Sports Management, East London South Africa, e-mail: Pacha-anyi@wsu.ac.za

Neliswa Nomkhosi DLAMINI

Tshwane University of Technology, Business School, Pretoria,
South Africa, e-mail: nnndlamini@ymail.com

Citation: Acha-Anyi P.N. & Dlamini N.N. (2019). FESTIVAL TOURISM AS AN INSTRUMENT OF SUSTAINABLE LIVELIHOOD IN ESWATINI. *GeoJournal of Tourism and Geosites*, 26(3), 849–860. <https://doi.org/10.30892/gtg.26314-402>

Abstract: This paper explores festival tourism and its effectiveness as an instrument of sustainable livelihood in local communities. The study is premised on the contrasting scenario of the thriving MTN Bushfire festival in the midst of the communities in the Kingdom of Eswatini struggling under the weight of extreme poverty and high unemployment. A quantitative research approach was employed in collecting data from one hundred community members attending the festival. The key finding emanating from this study is that community members who took part in the study have a limited understanding of sustainable livelihood requirements as this is heavily skewed towards economic needs. The main recommendation from this study relates to greater stakeholder involvement and participation, especially communities, at all levels of festival planning, execution, and beneficitation.

Keywords: festival tourism; sustainable livelihood; MTN Bushfire festival; Eswatini; socio-economic impacts

* * * * *

INTRODUCTION

Tourism research lends credence to the significant strides that the events niche has made with regards to its attractiveness as a focus area and an economic activity (Getz & Page, 2016, Panfiluk, 2015; Taks et al., 2015). Similarly, in the international literature, an increasing pool of studies seem to affirm a positive trajectory in the socio-economic contribution of events to the host communities (Diedering & Kwiatkowski, 2015, Kwiatkowski, 2015; Frechtling, 2006; Gao & Wu, 2017; Nyikana, & Tichaawa, 2018). However, it is important to take cognisance and acknowledge the fact that diverse social (Yürük et al., 2017; Arcodia & Whitford, 2007), cultural (Connell et al., 2015; Neal et al., 2007; Ntloko & Swart, 2008) and environmental (Collins & Cooper,

* Corresponding author

2017; Andersson, & Lundberg, 2013) impacts generally arise from hosting events. In fact, Getz (2013a, 2013b) purports that the interdisciplinary nature of studies related to events and the social science implication continues to expand. According to Steinbrink, Haferburg & Ley, (2011), there is a growing appeal for festivals and events tourism globally, and particularly in developing countries which seek to diversify their economies. The rationale for this is multifaceted but mainly premised on the notion that festivals and events, in general, will provide an additional incentive for tourists to visit their countries. Of course, increased tourist flows tend to stimulate investment (both local and foreign) in the local economy. Additionally, hosting festivals also serve as a stimulus for the development of other Small, Micro and Medium-sized Enterprises (SMMEs) which tend to be quite instrumental in job creation.

In the same vein, tourism development usually necessitates the upgrade or maintenance of the host destination infrastructure such as roads, water supply, transport system, information technology (IT), among others (Diedering & Kwiatkowski, 2015). In an attempt to gain market share, Dwyer et al. (2005) assert that service providers in sectors such as accommodation, catering, restaurants and so on would want to improve their facilities and service quality during the period when the festival is taking place. Hence, hosting an event or festival could provide the extra impetus to fast-track development in the tourism sector. All these benefits accrue to the host destination before and during the event. Getz & Page (2016) advance the view that place-marketing has become a tradition and subsequently emerged as one of the principal motivations for destinations hosting tourism events and festivals. Successful delivery of the event introduces a new selling proposition to potential visitors and unveils a new tourism offering for the destination, thereby enhancing its competitiveness (Pike & Page, 2014). Ford & Peeper (2007) point to the United States of America (USA) as an illustration of this event-led tourism marketing approach where conventions and events have systematically been used to achieve key tourism objectives. Nyikana and Tichaawa (2018) equally acknowledge the prevalence of the event-led tourism proposition in developing countries, especially those in the Global South. As a development strategy, this approach tends to boost destination attractiveness, subsequently, attract new investment, create employment and ultimately result in economic growth (Bouhaouala, 2015). This explains, at least in part, the growing traction of developing countries, such as the Kingdom of Eswatini to host an increasing number of events in the expectancy that the dividends from such events would accrue to the communities and the kingdom at large. This paper seeks, therefore, to explore the sustainability of festivals as an instrument to improve the livelihood of local communities.

Festivals and sustainable livelihoods

While research purporting the effectiveness of tourism in driving socio-economic change in communities has been around for decades, the same cannot be said of festivals as a tourism niche (Diedering et al, 2015; Murphy et al., 2007). Festivals and events, in general, have only recently emerged as viable options for uplifting community livelihoods and alleviating poverty (Wu & Pearce, 2013). The impetus in festivals as instruments of development has not only kindled research interests but also resulted in policy shifts in favour of the inclusion of festivals in strategies for Local Economic Development (LED). In fact, festivals now feature prominently in the economic planning and tourism development trajectories of many regions, communities and countries (Davies et al., 2010; Getz & Page, 2016; Tichaawa, 2016). This is hardly surprising because the benefits of festivals are multifaceted and present a holistic platform from which to approach the challenge of community livelihoods. Notwithstanding, literature highlighting the benefits of festivals and events has been

predominantly tilted in favour of direct economic gains such as job creation and income generation (Dwyer et al., 2005; Sharpley, 2002). It is, however, important to emphasise that the impacts of festivals stretch well beyond direct economic benefits as subsidiary industries such as agriculture, fishing, forestry, handicrafts and food processing tend to get a boost, albeit indirectly, from festivals (Muresan et al., 2016; Su et al., 2016).

Lasso & Dahles, (2018), Yürük et al, (2017), Caiazza and Audretsch, (2015) and Huang & Zhang, (2012) emphasise the importance of adopting a more holistic approach to the analysis of the impacts of festivals by examining the socio-cultural attributes of festivals and events. These studies point to the fact that behavioural changes might take long to manifest but do have lasting effects. Similarly, Getz (2010) and Gibson and Wong (2011) lament the paucity of research into the environmental impacts of festivals. Andersson & Lundberg, (2013); Collins et al. (2012); and Patterson et al. (2008) assert the importance of adopting a more balanced approach towards an analysis of the benefits of festivals. In this regard, Collins & Cooper (2017) propose the implementation of the triple-bottom-line approach that will ensure a comprehensive analysis of the economic, socio-cultural and environmental impacts of festivals.

Sustainable livelihoods

The dynamism and whirlpool in festivals to trigger a change in communities has been widely acknowledged in literature (Wu & Pearce, 2013; Sirima & Backman, 2013; Su et al, 2016). While some changes attributed to festivals and events might be undesirable, there is overwhelming evidence to suggest that properly planned and executed festivals can significantly improve living conditions in communities (Gao & Wu, 2017; Niehof, 2004; Su et al., 2016). This credits festival tourism as a favourable instrument for enhancing livelihoods in communities. The community livelihood approach is a people-centred perspective that recognises human well-being as the nucleus of sustainable development. Hence, the concept of sustainable livelihoods advocates meeting the needs of individuals and communities in the present and distance future as the cornerstone of sustainable development (Gao & Wu, 2017; Su et al, 2019). In this context, the sustainable livelihood strategy recognises the complexity of human needs and aspirations which extend well beyond economic provision (poverty alleviation, food security, job security, etc) to examine issues such as improved wellbeing, socio-cultural sustainability, and natural resource sustainability. Chambers & Conway (1992) describe a livelihood that is sustainable as one that is able to withstand the shocks associated with livelihood assets and make it possible for similar assets to be availed to future generations to provide for their own needs. Ellis (2000) explains that insights into a livelihood situation can be analysed at various hierarchical levels, starting from households to eventually portray the community situation.

From a community perspective, Kheri & Nasihatkon (2016) purport that livelihood diversity is central when assessing livelihood sustainability. They (Kheri & Nasihatkon, 2016) argue that the sustainability of livelihoods hinges on the flexibility of choice within communities with regards to income allocation, freedom to select from a number of activities and mobilise various resources. The notion of the flexibility of choice is considered important because community members, especially in rural areas, do not usually rely on one economic activity to meet their needs, but rather engage in a number of activities (Chambers & Conway, 1992). Therefore, livelihood resources have been identified as consisting of natural, physical, economic, human and socio-cultural resources that can be used to generate outcomes in a livelihood system (Tao & Wall, 2011). It is in this context that Chambers & Conway (1992) cited in Tao & Wall (2009) define a livelihood as comprising, “the capabilities, assets (including both material and social resources) and activities required for a means of living. A livelihood is sustainable

when it can cope with and recover from stresses and shocks, maintain and enhance its capabilities and assets, while not undermining the natural resource base.”

Tourism in the Kingdom of Eswatini

The Kingdom of Eswatini, formerly known as Swaziland is a landlocked monarchy in Southern Africa. The country’s population of 1, 147, 842 inhabitants share a landmass of 17,300 square kilometres (World population review, 2019). Poverty levels in the kingdom of Eswatini are quite high at 39.7% (World Bank, 2019), with an unemployment rate of 47.1% (CIA, 2019) and life expectancy currently stands at 31.88 years (World population review, 2019). Geography and economic dependence create a strong bond between Eswatini and South Africa, considering that the two countries share borders to the northwest and south and the kingdom of Eswatini relies on South Africa for 85% of its imports and 60% of its exports (World Bank, 2019).

The government of Eswatini recognises the tourism sector as a major national priority in its quest to improve the quality of life of the citizens. In this vein, the government envisages a tourism sector that is instrumental in poverty alleviation, job creation and the redistribution of incomes to reduce inequality (Government of Eswatini, 2010). Festival tourism features prominently among the six identified niche areas that the government intends to pursue growth (government of Eswatini, 2010). There is substantial evidence that suggests that government initiatives aimed at promoting tourism have produced positive results. The World Travel and Tourism Council (WTTC) economic impact statistics reveal that the tourism sector in Eswatini made significant strides in 2018 as the sector registered a growth of 3.9%, surpassing the world economic growth rate of 3.2% (WTTC, 2019). With regards to general economic performance, the travel and tourism sector contributed +6.4% to the country’s Gross Domestic Product (GDP) and 4.6% to total employment (WTTC, 2019). It is against this background that this research interest emanates; to assess the impact of the MTN Bushfire festival as an instrument of sustainable livelihoods among the neighbouring communities.

The MTN Bush fire festival

The MTN bushfire festival is an annual celebration of music and art held in the scenic farmlands of the Malkerns Valley in the Kingdom of Eswatini. During the three-day period, participants use different platforms to engage in discussions, workshops, art exhibitions and of course, the music festival. However, while the organisers describe the event as a celebration of the human spirit through a symbiosis of music and various artistic expressions (MTN Bushfire.com, 2019), critics regard the festival as a “clash of cultures” during which the cultural norms and values of the monarchy are annihilated by the social “freedoms” of the modern world epitomised by drug and substance abuse (Akoob et al., 2018). According to MTN Bushfire.com (2019), over 30, 000 people from sixty different countries attended the MTN Bushfire festival in 2019.

The festival promotes responsible global citizenry through themes such as “Bringyourfire” in the bring your fire zone where the participants are encouraged to light the fire of their passion through activism in various social engagements; “Lightyourfire” through the MTN Bushfire schools’ festival which takes the form of an outreach programme in schools to orientate and support learners in the arts; the “Craftyourfire” festival with the MTN Bushfire arts round table during which professional artists present discussions on how to be successful in the performing arts; “#Shapeyourfire” representing the legacy internship and volunteering programmes; the “Greenyourfire” aimed at encouraging environmental sustainability; and the “Moveyourfire” with Igoda Southern African music festival (MTN Bushfire.com, 2019). Therefore, this study seeks to analyse the perceptions of community members on the livelihood sustainability of the MTN Bushfire festival.

MATERIALS AND METHODS

In order to analyse the effectiveness of the MTN Bushfire festival as an instrument of sustainable livelihoods among the communities in close proximity to the festival venue, a quantitative research approach was employed. To this end, a questionnaire with close-ended questions was developed for distribution among qualifying participants during the three-day long festival. Following a review of the literature on sustainable livelihoods, various aspects and determinants of sustainable livelihoods were identified for inclusion and testing through the questionnaire. The idea was to gauge the perceptions of the community members present at the MTN Bushfire festival regarding the extent to which they thought the festival met each of the identified sustainable livelihood elements. To further ensure that each retained sustainable livelihood construct was aligned with festivals, the list of constructs was benchmarked against the instrument for measuring community perceptions of the impacts of festivals (Viviers & Slabbert, 2012).

The questionnaire was distributed during the MTN Bushfire festival from the 25 – 27 May 2018. It is important to note that only festival participants permanently residing in the host region of the festival were considered eligible to take part in the study. To ensure that this condition was met, selected field workers were all registered on the Btech tourism programme and originally from Eswatini. This was meant to ascertain their familiarity with the local culture and language. The field workers were then able to validate any potential respondent as a local citizen through a conversation in the local language. During the festival, participants were randomly approached and asked if they came from any of the surrounding communities. A positive response and validation through conversation were then followed by a verbal question asking if they would like to take part in the study. Potential respondents who expressed their willingness to participate in the study were handed the questionnaire to self-complete. A total of 100 questionnaires were duly completed and successfully collected among MTN Bushfire participants who identified themselves as inhabitants of the local community. Equally worthy of note is the fact that the population of this study was considered unknown considering that it was virtually impossible to identify all local community members in attendance at the MTN Bushfire festival during the three days of the event. However, MTNbushfire.com (2019) and Akoob et al. (2018) indicate that most of the participants at the MTN Bushfire festival come from about 60 different countries.

RESULTS DISCUSSIONS

Profile of the respondents

Data captured in table 1 below reveals that most of the respondents were female (57%) and the dominant (32%) age group was between the ages of 26 – 30 years old, followed by the 20 – 25 years age group (18%). It is also evident from the data in table 1 that majority of the respondents (69%) are employed by private sector organisations and 62% of the respondents have been educated to the level of a certificate or degree. It is hardly surprising that most of the respondents (61%) come from the Malkerns valley as this is the host community of the MTN Bushfire festival. The rest of the respondents come from the communities of Ezulwini (17%), Mbabane (8%), Mahlanya (7%), Lobamba (3%), Manzini (2%) and Matsapha (2%).

Respondents' perceptions of the livelihood sustainability of the festival

The literature on livelihood sustainability (Muresan et al., 2016; Su et al., 2016; Yürük et al., 2017; Caiazza & Audretsch, 2015; Huang & Zhang, 2012) reveals three important considerations in achieving livelihood sustainability, namely: economic factors, socio-cultural factors, and environmental aspects. Hence, the respondents' perceptions have been clustered following this approach for ease of analyses.

Economic aspects of the livelihood sustainability of the festival

Data captured in table 2 below reveals that most of the respondents (73%) fully agree or agree with the assertion that the MTN Bushfire festival contributes to job creation in the Kingdom of Eswatini. Similarly, 72% fully agree or agree that the festival contributes to income generation and financial support (71%) for Small, Micro and Medium-sized Enterprises (SMMEs) in the Kingdom. However, in sharp contrast, only 28% of the respondents fully agree or agree that the MTN Bushfire festival can reduce poverty in Eswatini. Even more interestingly, the data in table 2 seems to highlight the fact that despite the short term gains in jobs, incomes and financial support, long term benefits such as poverty alleviation, better training, more investment and increase in property value can hardly be achieved through once-off occurrences such as the MTN Bushfire festival.

Table 1. Profile of respondents

Demographic characteristic	Category	Frequency (N)	Percentage
Gender	Male	43	43%
	Female	57	57%
Age	20 - 25	18	18%
	26 - 30	32	32%
	31 - 35	16	16%
	36 - 40	11	11%
	41 - 45	5	5%
	46 - 50	6	6%
	50+	12	12%
Occupation	Unemployed	5	5%
	Self-employed	6	6%
	Government employee	12	12%
	Private sector employee	69	69%
	Other	3	3%
Education	No schooling	4	4%
	Grade 1-11	13	13%
	Grade 12	21	21%
	Certificate	20	20%
	Diploma/Degree	31	31%
	Postgraduate	11	11%
Community of origin	Ezulwini	17	17%
	Lobamba	3	3%
	Mahlanya	7	7%
	Malkerns	61	61%
	Manzini	2	2%
	Matsapha	2	2%
	Mbabane	8	8%

Socio-cultural aspects of the livelihood sustainability of the festival

With regards to the socio-cultural impacts of the MTN Bushfire festival on the community, data presented in table 3 reveals that the gap between the aspects that the respondents tend to either agree or disagree with is not as wide as in the economic aspects. For instance, majority of the respondents (56%) fully agree or agree that they have a sense of cultural pride during the MTN Bushfire festival and 66% of the respondents fully agree or agree that the festival creates a platform for people to know about their culture. Still, on the cultural domain, majority of the respondents (55%) fully agree or agree that the festival gives them an opportunity to learn about other cultures.

However, the respondents' views on the social impacts of the festival are largely negative. Even though majority of the respondents (56%) are of the view that the MTN Bushfire festival has a positive impact on peaceful living among people, there is a general perception that the festival will not whisk away the social ills in the community.

Table 2. Perceptions of respondents on the economic impacts of the MTN Bushfire festival on community livelihood sustainability

IMPACT AREA	RESIDENTS' PERCEPTION				
	Strongly disagree	Disagree	Not sure	Agree	Fully agree
More jobs	5%	5%	17%	36%	37%
More income	5%	6%	17%	40%	32%
Financial support for SMMEs	7%	7%	15%	37%	34%
More training	13%	18%	25%	27%	17%
Less poverty	13%	24%	35%	18%	10%
More investment	7%	19%	27%	28%	19%
Increase value of land/property	7%	21%	32%	12%	28%

For instance, only 28% of the respondents agree/fully agree that the festival contributes to a reduction in crime and even fewer respondents (16%) express the view that the festival leads to a reduction in prostitution. Curiously, majority of the respondents do not appear to attribute the prevalence of any social ills to the MTN Bushfire festival. A close examination of all the data on socio-cultural impacts reveals that apart from the impact on "less prostitution" where majority (57%) of the respondents disagree or strongly disagree, there is no other impact area on which there is a simple majority (50%) on either side. This general sense of indecision puts into question, at least from the point of view of these respondents the view that the MTN Bushfire festival flaunts the socio-cultural values of the Kingdom of Eswatini.

Table 3. Perceptions of respondents on the socio-cultural impacts of the MTN Bushfire festival on community livelihood sustainability

IMPACT AREA	RESIDENTS' PERCEPTION RATING				
	Strongly disagree	Disagree	Not sure	Agree	Fully agree
Cultural pride	5%	14%	25%	21%	35%
More people knowing about our culture	2%	11%	21%	25%	41%
Learn more about other cultures	7%	9%	29%	27%	28%
More peace among people	6%	16%	22%	34%	22%
More sports and recreation facilities	13%	28%	32%	17%	10%
More diseases	17%	30%	24%	12%	17%
Less crime	14%	30%	28%	14%	14%
Less prostitution	27%	32%	25%	8%	8%
Entertainment facilities	5%	12%	36%	23%	24%

Environmental aspects of the livelihood sustainability of the festival

Data presented in table 4 below reveals the perceptions of the respondents regarding the impacts of the MTN Bushfire festival on various aspects related to environmental sustainability. According to Su et al (2019); Lasso & Dahles, (2018) and Tao et al (2009), natural resources and environmental sustainability are important components of any livelihood strategy. Hence, this study deemed it necessary to find out the respondents' perceptions of the impact of the MTN Bushfire festival on different aspects of the environment. Data displayed on table 4 reveals that majority (57%) of the respondents do not share the perception that the festival contributes to animal and plant (56%) protection. In both impact areas (animal and plant protection), only a minimal proportion (11%) of the respondents are of the view that the festival makes any positive contribution to animal and plant protection. However, majority (43%) of the respondents agree or fully agree that the MTN Bushfire festival has a negative impact on the environment through increased littering. While slightly greater proportion (37%) of respondents do not share the view that the festival causes increased pollution, a close proportion (34%) agree with the assertion, and 29% of the respondents are not sure. However, there is greater clarity regarding the impact of the MTN Bushfire festival on environmental protection. Most of the respondents (49%) attest to the positive impacts of the festival on the environment and only 23% indicate that the impact on the environment is negative.

Table 4. Respondents' perceptions on the environmental impacts of the festival

IMPACT AREA	RESIDENTS' PERCEPTION RATING				
	Strongly disagree	Disagree	Not sure	Agree	Fully agree
Animal protection	22%	35%	32%	9%	2%
Plant protection	20%	36%	33%	6%	5%
Increase pollution	11%	26%	29%	15%	19%
Increase littering	10%	16%	31%	19%	24%
More waste of water	22%	24%	27%	13%	14%
Greater environmental protection	6%	17%	28%	25%	24%

Table 5. Perceptions on the impact of the festival on personal quality of life and community quality of life

Impact of MTN Bushfire festival on personal quality of life	Percentage	Impact of MTN Bushfire festival on community quality of life	Percentage
Very negative	1%	Very negative	2%
Negative	5%	Negative	6%
No change	32%	No change	16%
Positive	23%	Positive	37%
Very positive	39%	Very positive	39%

General perceptions on the impact of the festival on quality of life

The final section of the questionnaire required respondents to indicate their perceptions on the impact of the MTN Bushfire festival on their personal quality of life and the quality of life in the community. There is no doubt from data captured on table 5 that the general sentiment is positive (62% for personal quality of life and 76% for

community quality of life). Notwithstanding, it is quite intriguing that there is a large gap (14%) between the positive impact of the festival on personal quality of life and community quality of life. Similarly, 32% of the respondents express the view that the festival has no impact on their personal quality of life, while only 16% of the respondents indicate that the festival brings no change to the quality of life in the community.

CONCLUSION

The purpose of this study was to assess the effectiveness of festival tourism as an instrument of sustainable livelihoods. This was explored in the context of the annual MTN Bushfire festival held in the Malkerns valley in the Kingdom of Eswatini. Considering the high levels of poverty and unemployment in Eswatini, this study was deemed urgent and valuable in the sense that the results could provide an opportunity to improve the livelihood situation of the people of Eswatini. The following conclusions emanate from the findings of this study: Firstly, findings on the economic impacts of the MTN Bushfire festival on community livelihood lead to the conclusion that the respondents see the benefits of the event as mainly short term. This is plausible because, during the festival or at least in the short term, it is easy to see people in active employment, earning wages/income or selling various items. However, beyond these tangible benefits, the respondents do not foresee any significant changes to the community's livelihood with regards to poverty alleviation, greater investment and skills development. This is in contrast to the existing literature on sustainable livelihoods (Lasso & Dahles, 2018; Akoob et al., 2016; Su et al, 2016) which advocate long term economic gains for the local people. The second conclusion regards the findings on socio-cultural impacts of the MTN Bushfire festival on the community's livelihood. The near-even spread of the respondents' perceptions on various socio-cultural impacts of the festival lends the conclusion that these items are not highly rated among community members (respondents).

This assertion is further strengthened by the large percentage of respondents who are not sure if socio-cultural impacts from the event are negative or positive. Studies by Diederling & Kwiatkowski (2015), Yürük et al (2017), Caiazza & Audretsch (2015) and Huang & Zhang (2012) attest to this view that socio-cultural attributes of community livelihoods are not given the same attention as economic factors. A similar conclusion of an apathetic attitude can be reached regarding the environmental impacts of the festival on community livelihood. This is evident in the consistently high percentage of respondents who expressed the view that they were not sure of various impacts of the MTN Bushfire festival on the environment. In fact, it is on the environmental impact factors that most respondents disagreed that the festival generated benefits to the community. Again, this low rating of the environmental benefits of festivals is consistent with previous studies (Collins & Cooper, 2017; Gibson & Wong, 2011; Dolles & Soderman, 2010).

Implications

The findings and conclusions of this study avail the following implications: Organisers of the MTN Bushfire festival need to engage the community and other development stakeholders more closely if the event aims to make a more effective contribution to the livelihood of the local community. This entails getting more meaningful participation from the community members from inception to planning and execution of the festival. As obtained in literature (Su the, 2019; Tao & Wall, 2009) ownership of assets is an important aspect of sustainable livelihood. Hence, the need for the local community to have a sense of ownership towards the MTN Bushfire festival.

Furthermore, there is a need to ensure that community gains from the MTN Bushfire festival are sustained in the long term. This aspect is particularly important if the event is to have any legacy beyond the last event. In other words, if any jobs, incomes and SMME benefits are to varnish with the last musical display, then the event will have little

or no long-term impact. Pre-festival outreach activities such as youth events organised in schools should be extended to communities. The implications of this study also reside in the need for community awareness programmes regarding how to transform events such as the MTN Bushfire festival into instruments for sustainable livelihood opportunities. This will entail getting community members alert on the usefulness of their natural resource base and the need to ensure it is protected. They will, therefore, be vigilant on any cases of abuse, rather than stay in the current state of apathy.

Recommendations

It is recommended that greater stakeholder engagement be sort for the MTN Bushfire festival. Organisers of the festival should invite community members, Eswatini government officials and leaders of social and environmental organisations to their planning meetings and involve them in the execution of the festival. This will work towards sustaining both the festival and the community as all stakeholders will have a strong motivation to protect it. There is an urgent need to sensitise communities on the fact that sustaining their livelihood goes beyond having access to economic opportunities. It requires taking ownership of and sustaining natural resources, environmental and socio-cultural assets (Collins & Cooper, 2017; Gibson & Wong, 2011; Su et al, 2019). To this end, it is recommended that the government takes leadership in educating communities on the economic opportunities that festivals such as The MTN Bushfire festival, and the responsibility of festival organisers to the community, the environment and the socio-cultural norms of the local people.

The misconception that economic opportunities will resolve all community challenges should be addressed. From the triple-bottom-line perspective, it is recommended that organisers of the MTN Bushfire festival place more emphasis on environmental education of the host community. This is necessitated by the respondents' passive attitude towards environmental considerations. Furthermore, this study recommends that further studies be conducted on the socio-cultural costs of the MTN Bushfire festival on Eswatini. The current study has revealed the respondents' low consciousness on the socio-cultural impacts of the festival. Considering the high profile of the cultural theme on the Eswatini tourism marketing material (government of Eswatini, 2010) there is a concern that the MTN Bushfire festival could erode some of the kingdom's socio-cultural prowess. Finally, it is recommended that more effort be put into encouraging local community participation at the MTN Bushfire festival.

Finding local participants at the festival proved to be a great challenge, hence the limitation imposed on this study by the low response rate. It is acknowledged that a higher rate of respondents in this study might produce a different result in certain aspects of the study. However, this can only be tested if more locals have access to the festival. The organisers of the MTN Bushfire festival are therefore urged to actively engage local communities in this regard.

REFERENCES

- Akoob, R., Allison, S. & Collison, C. (2018). *Clash of the cultures: The absolute monarchy and the music festival*. Available at: <https://mg.co.za/article/2018-06-01-00-clash-of-the-cultures-the-absolute-monarchy-and-the-music-festival>. Accessed on 22 June 2019.
- Andersson, T.D., & Lundberg, E. (2013). Commensurability and sustainability: Triple impact assessments of a tourism event. *Tourism Management*, Vol. 37, pp. 99-109.
- Arcodia, C., & Whitford, M. (2007). Festival attendance and the development of social capital. *Journal of Convention & Event Tourism*, Vol. 8, No. 1, pp. 1-18.
- Bouhaouala, M. (2015). Definition of sports tourism through a virtuous socio-economic relationship. *Proceedings of SENS, Labex Item*, pp. 1-20, Université Joseph Fourier, Dijon, France, 12 & 13 May 2015. Dijon: Journées Internationales de Management du Sport, du Tourisme Sportif et des Loisirs Actifs.

- Caiazza, R., & Audretsch, D. (2015). Can a sport mega-event support hosting city's economic, socio-cultural and political development? *Tourism Management Perspectives*, Vol. 14, pp. 1-2.
- Chambers, R., & Conway, G. (1992). *Sustainable rural livelihoods: Practical concepts for the 21st century*. Brighton: IDS, IDS Discussion Paper 296.
- Collins, A. & Cooper, C. (2017). Measuring and managing the environmental impact of festivals: the contribution of the Ecological Footprint. *Journal of Sustainable Tourism*, Vol. 25, No. 1, pp. 148-162.
- Collins, A., Munday, M., & Roberts, A. (2012). Tourism consumption at major events and environmental consequences: An analysis of the UK stages of the 2007 Tour de France. *Journal of Travel Research*, Vol. 5, No. 5, pp. 577- 590.
- Connell, J., Page, S. J., & Meyer, D. (2015). Visitor attractions and events: responding to seasonality. *Tourism Management*, Vol. 46, pp. 283-298.
- Davies L., Ramchandani G., & Coleman R. (2010). Measuring attendance: issues and implications for estimating the impact of free-to-view sports events. *International Journal of Sports Marketing & Sponsorship*. Vol. 12, No. 1, pp. 11-23.
- Diedering, M. & Kwiatkowski, G. (2015). Economic impacts of events and festivals on host regions – methods in practice and potential sources of bias. *Polish Journal of Sport and Tourism*, Vol. 22, No. 1, pp. 247-252.
- Dolles, H., & Soderman, S. (2010). Addressing ecology and sustainability in mega-sporting events: The 2006 Football World Cup in Germany. *Journal of Management & Organization*, Vol. 16, No. 4, pp. 587-600.
- Dwyer L., Forsyth P., Spurr R. (2005). Estimating the impacts of special events on an economy. *Journal of Travel Research*, Vol. 43, No. 4, pp. 351-359.
- Ellis, F. (2000). *Rural livelihoods and diversity in developing countries*. Oxford: Oxford University Press.
- Ford, R. C., & Peeper, W. C. (2007). The past as prologue: predicting the future of the convention and visitor bureau industry on the basis of its history. *Tourism Management*, 28(4), 1104e1114.
- Frechtling D.C. (2006). An assessment of visitor expenditure methods and models. *Journal of Travel Research*, Vol. 45, No. 1, pp. 26-35.
- Gao, J. & Wu, B. (2017). Revitalizing traditional villages through rural tourism: A case study of Yuanjia Village, Shaanxi Province, China. *Tourism Management*, Vol. 63, pp. 223-233.
- Getz, D. (2010). The nature and scope of festival studies. *International Journal of Event Management Research*, Vol. 5, No. 1, pp. 1- 47.
- Getz, D. (2013a). Event tourism: Concepts, international case studies, and research. New York: Cognizant.
- Getz, D. (2013b). Ecotourism events. In R. Ballantyne (Ed.), *International handbook on ecotourism*. Edward Elgar Press.
- Getz, D. & Page, S. J. (2016). Progress and prospects for event tourism research. *Tourism Management*, Vol. 52, No.4, pp. 593-631.
- Gibson, C.R., & Wong, C. (2011). Greening rural festivals: Ecology, sustainability and human-nature relations. In C.R. Gibson & J. Connell (Eds.), *Festival places - Revitalising rural Australia* (pp. 92-105). Bristol: Channel View Publications.
- Huang, H.-Y., & Zhang, L. (2012). Research note: Estimation of the non-market value of sports events: A case study of the civic pride generated by the 2009 Shanghai ATP masters 1000. *Tourism Economics*, Vol. 18, pp. 887-895.
- Kheiri, J., & Nasihatkon, B. (2016). The effects of rural tourism on sustainable livelihoods (case study: Lavij rural, Iran). *Modern Applied Science*, Vol. 10, No. 10, pp. 10-22.
- Kwiatkowski G. (2015). The economics of sport event attendees, in Department of Environmental and Business Economics. 2015, University of Southern Denmark: Esbjerg.
- Lasso, A. & Dahles, H. (2018) Are tourism livelihoods sustainable? Tourism development and economic transformation on Komodo Island, Indonesia. *Asia Pacific Journal of Tourism Research*, Vol. 23, No. 5, pp. 473-485.
- Muresan, I. C., Oroian, C. F., Harun, R., Arion, F. H., Porutiu, A., Chiciudean, G. O., et al. (2016). Local residents' attitude toward Sustainable rural tourism development. *Sustainability*, Vol. 8, No. 1, 100. Available at: <https://doi.org/10.3390/su8010100>. Accessed on 18 – 06 – 2019.
- Murphy L., Mascardo G., & Benckendorff P. (2007). Exploring word of mouth influences on travel decisions: friends and relatives vs. other travellers. *International Journal of Consumer Studies*, Vol. 31, No. 5, pp. 517-527.
- Neal, J., Uysal, M., & Sirgy, J. (2007). The effect of tourism services on travellers' quality of life. *Journal of travel research*, Vol. 46, pp. 154-163.
- Niehof, A. (2004). The significance of diversification for rural livelihood systems. *Food Policy*, Vol. 29, No. 4, pp. 321-338.
- Ntloko, N. J., & Swart, K. (2008). Sport tourism event impacts on the host community-a case study of Red Bull Big Wave Africa. *South African Journal for Research in Sport, Physical Education and Recreation*, Vol. 30, pp. 79-93.
- Nyikana, S. & Tichaawa, T. M. (2018). Sport Tourism as a Local Economic Development Enhancer for Emerging Destinations. *Euro Economica*, Issue 1, No. 37, pp. 70-83.
- Panfiluk, E. (2015). Impact of a Tourist Event of a Regional Range on the Development of Tourism. *Social and Behavioral Sciences*, Vol. 213, No. 1, pp. 1020 – 1027.

- Patterson, T.M., Niccolucci, V., & Bastianoni, S. (2008). Adaptive environmental management of tourism in the Province of Siena, Italy using the Ecological Footprint. *Journal of Environmental Management*, Vol. 86, pp. 407-418.
- Pike, S., & Page, S.J. (2014). Destination marketing organizations and destination marketing: a narrative analysis of the literature. *Tourism Management*, Vol. 41, pp. 202-227.
- Sharpley, R. (2002). Rural tourism and the challenge of tourism diversification: The case of Cyprus. *Tourism Management*, Vol. 23, pp. 233-244.
- Sirima, A., & Backman, K. F. (2013). Communities' displacement from national park and tourism development in the Usangu Plains, Tanzania. *Current Issues in Tourism*, Vol. 16, No. 7-8, pp. 719-735.
- Steinbrink, M. Haferburg, C. & Ley, A. (2011). Festivalisation and urban renewal in the Global South: Socio-spatial consequences of the 2010 FIFA World Cup. *South African Geographical Journal*, Vol. 93, No. 1, pp. 15-28.
- Su, M. M., Wall, G., & Jin, M. (2016). Island livelihoods: Tourism and fishing at long islands, Shandong Province, China. *Ocean & Coastal Management*, Vol. 122, pp. 20-29.
- Su, M. M., Wall, G., Wang, Y., & Jin, M. (2019). Livelihood sustainability in a rural tourism destination - Hetu Town, Anhui Province, China. *Tourism Management*, Vol. 71, pp. 272-281.
- Tao, T., & Wall, G. (2011). A livelihood approach to sustainability. *Asia Pacific Journal of Tourism Research*, Vol. 14, No. 2, pp. 137-152.
- Taks M., Chalip L., & Green B.C. (2015). Impacts and strategic outcomes from non-mega sport events for local communities. *European Sport Management Quarterly*, Vol. 15, No. 1, pp. 1-6.
- Tichaawa, T.M. (2016). *The geography of festival and tourism development: the case of Cameroon*. In R. Donaldson, G. Visser, J. Kemp & J. de Waal (eds.), *Proceedings of the Centenary Conference of the Society of South African Geographers* (pp. 219-225). Bloemfontein: Society of South African Geographers.
- Viviers, P. A. & Slabbert, E. (2012). Towards an instrument measuring community perceptions of the impacts of festivals. *Journal of Human Ecology*, Vol. 40, No. 3, pp. 197-212.
- Wu, M. Y., & Pearce, P. L. (2013). Host tourism aspirations as a point of departure for the sustainable livelihoods approach. *Journal of Sustainable Tourism*, Vol. 22, No. 3, pp. 440-460.
- Yolal, M., Gursay, D., Uysal, M. Kim, H., and Karacaog'lu, S. (2016). Impacts of festivals and events on residents' well-being. *Annals of Tourism Research*, Vol. 61, pp. 1-18.
- Yürük, P., Akyol, A., Simsek, G. G. (2017). Analyzing the effects of social impacts of events on satisfaction and loyalty. *Tourism Management*, Vol. 60, No. 1, pp. 367-378.
- *** Central Intelligence Agency (CIA). (2019). *The World Factbook*. Available at: <https://www.cia.gov/library/publications/the-world-factbook/geos/wz.html>. Accessed on 22 June 2019.
- *** Commonwealth Secretariat & Swaziland Tourism Authority (STA). (2013). *Provision of assistance to the Swaziland Tourism Authority: Draft Marketing strategy*. Accessed online at: <http://www.thekingdomofswaziland.com/downloads/STA/resources/Swaziland%20Marketing%20Strategy.pdf>.
- *** Geology.com. (2008). eSwatini (Swaziland) Map and Satellite Image. Available at: <https://geology.com/world/swaziland-satellite-image.shtml>. Accessed on 22 June 2019.
- *** MTN Bushfire.com. (2019). *Bring your fire*. 13th edition. Available at: <https://www.bush-fire.com/>. Accessed 28 June 2019.
- *** The Government of the Kingdom of Eswatini. (2010). *National tourism policy of the Kingdom of Swaziland*. Available at: http://www.gov.sz/index.php?option=com_content&view=article&id=1986:national-tourism-policy&catid=119&Itemid=375. Accessed 28 June 2019.
- *** The World Bank. (2019). *The World Bank in Eswatini*. Available at: <https://www.worldbank.org/en/country/eswatini/overview>. Accessed 11 June 2019.
- *** Times of Swaziland. (2015). We are ready for Bushfire – Freshlyground. May 27, 2015, page 27.
- *** World population review. (2019). *Eswatini population 2019*. Available at: <http://worldpopulationreview.com/countries/swaziland-population/>. Accessed 11 June 2019.
- *** World Travel and Tourism Council (W TTC). (2019). *Eswatini 2019 annual research: key highlights*. Available at: <https://www.wttc.org/economic-impact/country-analysis/country-data#undefined>. Accessed 28 June 2019.

Submitted:
20.07.2019

Revised:
25.09.2019

Accepted and published online
27.09.2019

A STUDY TO IDENTIFY TALENT DEVELOPMENT PRACTICES IN THE HOSPITALITY SECTOR AND ITS IMPACT ON ORGANIZATIONAL PERFORMANCE

Rajeev Ranjan MISHRA*

Amity University Uttar Pradesh, Faculty of Hospitality & Tourism,
Sector-125, Noida, India, e-mail: rajeevmishra1976@rediffmail.com

Piyush SHARMA

Amity University Uttar Pradesh, Faculty of Hospitality & Tourism,
Sector-125, Noida, India, e-mail: psharma3@amity.edu

Sanjeev KUMAR

IHTM, Maharshi Dayanand University, Rohtak, Haryana
124001, Rohtak, India, e-mail: sanjeev.rawal30@gmail.com

Citation: Mishra, R.R., Sharma, P., & Kumar, S. (2019). A STUDY TO IDENTIFY TALENT DEVELOPMENT PRACTICES IN THE HOSPITALITY SECTOR AND ITS IMPACT ON ORGANIZATIONAL PERFORMANCE. *GeoJournal of Tourism and Geosites*, 26(3), 861–873. <https://doi.org/10.30892/gtg.26315-403>

Abstract: This study aims to identify the talent development practices adopted by hospitality industry and its impact on their performance. The study has been based on empirical and secondary data collected from 70 luxury and budget hotels across seven countries in Asian region. Research showed that there are mainly five talent development practices out of 25, which are prevailing in both the luxury and budget hotels. These practices are mainly training & development, career development, performance appraisal, mentoring and recognitions and award. Further it was found from the regression analysis that, out of these five, only career development and performance appraisal practices were found to have a significant and positive impact on the organizational performance of the hospitality industry which has been measured in terms of ROA, ROE and growth in guest arrival in hotels during last five years.

Keywords: Talent development, organizational performance, hospitality, tourism, hotel, management, Asia, training and development

* * * * *

INTRODUCTION

The hospitality industry is among the fastest developing sector across the globe. According to the World Travel and Tourism Council, travel and tourism GDP makes up for more than one-tenth of the world's GDP and is also offering employment

* Corresponding author

opportunities at a huge scale. The hotels, restaurants and other institutions that make up the hospitality sector are ultimately important not merely in generating direct revenue for local economies, but also indirectly building the economies, through promotion of business, infrastructure and the regional status of a nation in the global scheme of things. In India, hospitality sector accounts for a healthy 7.5 % of the country's GDP, making it a highly influential industry (Malhotra, 2017). It is a major attraction for foreign direct investment into the country's economic growth and also a significant contributor to indirect tax collection at both state and central levels.

The quality of hospitality sector arises purely from the quality of its employment of human resource. It results in the need to pay attention to the talent and skill of employees that are recruited to work in the industry. In the present age, globalization and significant population migration have created talent wars across sectors and countries. Researchers have found that organizations are vying for the same pool of talents across the globe (Michaels et al., 2001). This competition for the most talented employees can give way to unethical business practices such as poaching. In fact, many organizations stand in the risk of losing their best talents to their rivals, leaving them in the unenviable position of starting all over again with training other employees or finding ways to tempt new talent into their fold (Brewster et al., 2007). It must be kept in mind that the entire growth of the hospitality industry is assumed on the availability, volume and quality of good talent along with the surety of retaining it within the sector. Thus there is a great need for talent in the hospitality industry all over the globe. Challenges that arise in search and sustenance of good talent are critical in bringing a boost in organizational performance and future success (Singh, 2018).

These deficiencies and lags in talent procurement and management have detrimental effects on the organizational performance. These gaps leave their shadow on important organizational factors like operating costs, bottom-line profitability, service, brand quality, and future growth. Organizations are waking up to the fact that talent needs to be introduced as well as nurtured to bring optimum growth of performance; talent must be developed through well-crafted exercises and practices. Talent development strategies attract and enhance talent that is best suited for organizational goals and aspirations. Over the years, these practices have been witnessed to achieve great results. The benefits of an efficient talent development practice can include better recruitment and retention rates and greater employee participation (Lewis & Heckman, 2006). While in the era of 1980s the HR agency was limited to the roles of administrative or supportive functions only, the 1990s saw a shift in the favour of HR industry being seen as strategically vital for organizational growth (Singh, 2018). This change in scenario and business perspective has brought the significance of human resources to the front. The war for talent that exists in the world is being dearly fought at every step, and employees with the talents of specialization, expertise and skill are considered as golden resources to be valued and encouraged.

The strategic importance of talented employees now poses to be key determinant in the company's decisions on design, development and delivery of a strategy. Not only talented employees, but talented managers and executives are also seen as a precious and valuable resource for an organization, which is proved by the global race to bring the best managers and recruiters to hire the talent that boosts the performance of the organization (Ford et al., 2010). This fact only stresses the importance of this topic to be studied and discussed at length. In the hospitality sector, job opportunities are vast and demanding, and talented employees are treated as a major asset and the primary source of competitive advantage (Frank et al., 2004). It then becomes vital to analyse the real

effectiveness of talent development practices adopted by employers and managers on the organizational performance in the hospitality sector. The talent development practices are wide and varied in the industry. There is a need in research to identify the most commonly prevailing practices and strategies used to develop and nurture talents among employees, and analyse their impact on overall organizational performance.

OBJECTIVE

1. To identify the talent development practices adopted for middle management by luxury hotels and budget hotels of selected Asian countries.
2. To measure and compare the effectiveness of talent development practices in luxury and budget hotels of selected Asian countries.
3. To measure the impact of talent development practices on the organizational performance of luxury hotels as well as budget hotels of selected Asian countries.

REVIEW OF LITERATURE

The discussion on talent development practices and their impacts cannot begin without understanding the meaning of the word 'talent'. According to Iles et al., (2010) and Kim et al., (2012) the concept of talent has been of great interest to researchers and practitioners alike over the last two decades. Talent can be described in brief as the euphemism for people (Nilsson & Ellstrom, 2012) and in corporate sector, it is seen in economic perspective as human capital, assets or market value of a worker for contribution to the organization (Brown & Tannock, 2009).

According to Baum (2015) hotels rely a lot on low skilled or unskilled workers; and thus the lack of clarity of the concept of talent is more 'pronounced' within this industry. However, it may be defined, there is no doubt about the fact that talent is an essential cog in running a company, and has a central importance in the hospitality industry which is service intensive and has a peculiar employment structure challenged too often by problems in employee retention. It is this essentiality of talent in hospitality sector that demands its development and nourishment for positive outcomes. The concept of talent development and management is increasingly discussed in literature (Stahl et al., 2007, Scullion et al., 2011, Berger & Berger, 2003). It has been said to have imperative role to play in any industry (Barlow, 2006).

It is understood to include all stages of bringing and growing talent within an organization, from sourcing of new talent and screening it for suitable purpose, to retention and deployment of the employees in the organization (McDonnell, 2011). The management of human resource involves management of individual skills and abilities (Nilsson & Ellstrom, 2012). Cascio (2015) defined talent development as the science of using strategic HR to improve business value and make it possible for companies and organizations to reach their goals. Sumardi and Othman (2009) gave two approaches to talent development namely the exclusive approach which includes selection of a group of managers for special attention and secondly, the alternative approach which was more inclusive in nature and focused on developing all managers. Talent development is a very complex and fraught activity (Barlow, 2016). Standardized approaches that operate on assumptions of similarities between talented people often do not work very effectively. Talented people are capable of being high performing contributors to an organization but need support from the management. Therefore, talent development should form an integral part of the central activities underlying human resource management. As per Garavan (2012), talent development is a focus on the plan,

selection and implementation of development practices for the workforce in the organization to meet the pre-set objectives (Maycock & Ikuomola, 2015).

As per McCauley and Douglas (2004), talent development practices can be of five categories namely developmental relationships, assignments, feedback systems, formal programs and individual self- development methods. Developmental relationships are about fostering talent through creating artificial relationships such as mentoring and coaching to encourage learning and growth of skill. Developmental assignments include career progression through strategic promotions and other encouraging methods.

Feedback systems develop talent through establishing a structure of checks and balances, and pointing inconsistencies and smoothing them out for stabilizing talent development. Formal programs include training and preparation for a newer set of challenging tasks at work. Lastly, individual self- development methods are made up of activities like surplus reading and practice that is encouraged through the establishment of either physical structures like libraries, or amenities like incentive bonuses. These practices pertain to ensuring internal consistency of the talent employed at the organization (internal fit) and are incorporated into company's culture (cultural fit) after ensuring their alignment with the company's goals and purposes (strategic fit). The combination of these three criteria then creates an inimitable system of practices and not only drives excellence in talent development but also contributes to organizational learning and knowledge management (Singh, 2018).

Thus, it is evident that talent development practices are an essential portion of human resource management in any organization. The crisis for talented employees has struck the corporate world only today, due to the changing scenario of workforce in the present era. The newer generations are witnessed to have a particular set of attitudes and work behaviours that are vastly different as compared to older generations which are set to retire and have their own demands accordingly (Magd, 2003) especially in the hospitality sector (Barlow, 2014). The present study shall answer questions that have been relatively unexplored in the wealth of literature available in this regard. The researchers have strived to identify commonly practiced talent development practices in the hospitality sector, and the impact on organizational performance.

RESEARCH GAPS

In the literature reviewed above, it can be seen that talent development has been very widely and varyingly defined but not many structured or quantitative studies seem to have been undertaken in the domain of talent development practices adopted by hotels through a comparative study in luxury hotels and budget hotels.

Another unexplored area in this field of research has been the relative impact of the various practices of talent development on the performance of hotels. The present study gains direction from the above cited gaps, and intends to explore further on the existing talent development practices and the challenges faced by organization and the employees in heading towards a talent ship based structure.

RESEARCH METHODOLOGY

The present paper is a study in the effect of talent and development practices upon organizational performance of an institution under the hospitality and tourism sector, especially in Asia. The researchers have derived from both primary and secondary sources of data to achieve the objectives of the study. Secondary data related to three parameters used for organizational performance have been collected from the annual reports and the financial statements of the hotels surveyed during current study. The period of the data

was from 2012 to 2017. Primary data was also collected from the employees and professionals working in the hospitality sector towards the perceived effectiveness of talent development practices in their organization, through face to face interactions, emails and through web sessions. The study has been conducted across a total of 70 hotels across major countries in Asia namely, India, Malaysia, Maldives, Thailand, Sri Lanka, Singapore and Indonesia. The hotels so surveyed included 35 luxury hotels and 35 budget hotels as well. This distinction was included to ensure a universal applicability of the study across different standards or types of hotels in the industry.

FINDINGS AND DISCUSSIONS

This section has been divided into three sections. First section discusses about the talent development practices prevailing in hotels, second section discusses the results related to the effectiveness of the talent development practices and third section comprises the results related to the impact of effectiveness of talent development practices on organizational performance.

Talent development Practices Prevailing in Hotels

Researchers have found the frequency of occurrence of common talent development practices across 35 luxury and 35 budget hotels from seven south-Asian countries that were chosen for the survey. The study includes data on 25 widely identified talent development practices like training and development of employees, mentoring, performance appraisals, team development and relationship management.

The researchers have collected data on which practices are prevalent among the surveyed hotels, both of luxury and budget types. This was done with the objective of identifying most commonly employed practices and techniques of talent development that prevailed across the surveyed hotels. The data thus collected reveals five most pervasive practices of talent development and development in the tourism and hospitality sector. These practices were training and development of employees, career development opportunities, performance appraisal at regular intervals, proper mentoring, and recognition and awards for encouraging talented employees.

These five techniques have been found to be positively practiced at all surveyed hotels of both luxury and budget status. All hotels across the surveyed countries have utilized these practices for the development of their employees. These can thus be concluded as most highly effective practices for talent development in the tourism and hospitality sector, regardless of geographical or political boundaries and kinds of services or status. With such maximum frequency and application of these practices, it follows that these practices also have a substantial impact on the organizational efficiency of any hospitality institution in managing their human talent resources.

Effectiveness of Talent development practices

The objective was to ascertain the most effective practices for talent development in the tourism and hospitality sector that is widely accepted across both luxury and budget hotels. Where majority of the hoteliers showed favour to a particular practice, it was understood to be an effective practice for developing good talent in the industry.

Several practices were identified in this manner to be best suited for the management and development of talent in the tourism or hospitality sector. Training and development practices for employees, especially for newer recruitments, were placed very highly in the list of favoured practices by hoteliers. Another practice that was found to be effective in the eyes of the hotel employees and managers was performance appraisal at regular intervals. This practice boosted talent through necessary re-evaluations by the organization managers. However, the practice of

continuous feedback received mixed response from the surveyed respondents in the survey. This implies that while timely performance appraisals are welcome and beneficial to improving organizational efficiency, very frequent or continuous feedback techniques could be detrimental to the objective of nurturing and developing talent.

Opportunities for career development when provided to employees could also have a major impact in encouraging talent and improving the efficacy of the organization. Employers that recognize the desire for job success and career growth are successful in developing talent and managing the human resource. Employers and HR managers can have a direct and key role to play in the development of talent. The practice of mentorship and guidance towards employees was found to be an effective technique to help in talent development in the hospitality sector. The respondent hoteliers also shed light on inefficient practices that do not create a substantial ripple in talent development. A very commonly used practice of recognition and awards for good performance was found to be not very effective in development of talent and by relation, boosting organizational efficiency. While a good number of hoteliers expressed favour towards its effectiveness, the majority of the respondents did not agree with the view, or were neutral about the same. This indicates that financial rewards or recognition were not very effectual in developing talent in employees across hospitality sector.

Table 1. Effectiveness of Talent Development Practices in Luxury and Budget Hotels

Sr. No.	Practice/ Method	Luxury Hotels	Budget Hotels	F-value	p-value
		Mean	Mean		
1	Training and development	3.74	2.06	43.038	.000
2	Career Development	3.94	2.17	65.676	.000
3	Performance Appraisal	3.94	2.31	59.073	.000
4	Exit Interviews	3.89	2.29	51.910	.000
5	Compensation Management	3.77	2.17	45.372	.000
6	Mentoring	3.74	2.29	28.768	.000
7	Recognition and Award	3.77	2.34	26.967	.000
8	Differential/ Outrageous Benefits	3.77	2.11	40.995	.000
9	Limited- term employee contracts	3.89	2.23	43.161	.000
10	Employee referrals	3.97	2.31	45.065	.000
11	Goals Alignment with the organization	4.63	2.23	147.906	.000
12	Continuous feedback	4.66	2.43	171.522	.000
13	Team Strengthening	4.63	2.57	153.801	.000
14	HR/ Talent analytics	4.49	2.71	77.981	.000
15	Consolidation of staff requirements	4.40	2.69	92.169	.000
16	Identification of talent gaps	4.74	2.60	139.803	.000
17	Managed recruiting process	2.94	1.40	58.665	.000
18	Internal sourcing	3.40	1.89	62.098	.000
19	Pre- hire assessment	3.40	1.91	60.885	.000
20	University/ college recruiting	3.29	2.03	55.129	.000
21	Employer branding	3.17	1.94	48.733	.000
22	Diversified workforce	3.40	1.91	55.719	.000
23	Relationship Management	3.40	1.86	58.183	.000
24	Accrued time-off for relaxation and creativity	3.77	1.17	276.033	.000
25	Succession Management	3.83	1.77	217.600	.000

Several practices for talent development were seen to be effective in varying degrees in luxury hotels in comparison with budget hotels, proving that the type of hotel

or organization has an impact on the effectiveness of talent development practices. In practices pertaining to training and development or mentoring of the employees, it was revealed that luxury hotels have a higher success rate than budget hotels. Similarly, in terms of providing recognition for good work and appreciative awards to talented employees, luxury hotels performed better than budget hotels in achieving a resultant growth in organizational performance. In the case of career development and performance appraisal practices, it was found that luxury hotels found the practices very effective for the organization. However, the biggest difference between the effectiveness of practices in luxury and budget hotels was found in the case of practices that tended to bring the employees interests in tune with the organizational aims. These practices included alignment of individual growth goals with the company's objectives, and strengthening teamwork in the entire organization. The data in its entirety then shows that talent development practices are more effective in general in luxury hotels in contrast to the budget hotels. Luxury hotels employ a great number of employees, and have well-formed mechanisms in place to ensure proper conduction of talent development practices. This is usually done through specific departments set aside for human resource management. In budget hotels, however, the workforce population is small in size and is often managed by either the owner of the hotel or a general manager that oversees the entire functioning of the hotel. Thus, luxury hotel derives greater effectiveness from talent development practices than budget hotels because of the availability of specialists and established structure for implementation of these practices.

Talent development practices and organizational performance

The researchers have formulated five hypotheses according to the exclusive relationship between each significant talent development practice and the impact on organizational efficiency in the hospitality sector.

Table 2. Talent development practices and organizational performance

Regression Model Summary	ROA	ROE	(Growth rate in guest arrival
R-value	0.909	0.526	0.840
R-square	0.827	0.275	0.706
Adjusted R-square	0.814	0.218	0.683
Anova Value	61.246	4.855	30.737
p-value	0.000	0.001	0.000
Constant	-7.982	-0.245	-6.778
Training and development	0.511**	0.152	0.530**
Career Development	0.364**	0.310**	0.368**
Performance Appraisal	0.320**	0.288**	0.316**
Mentoring	0.124**	0.081	0.018
Recognition and Award	0.077	0.117	0.010

The organizational performance in the present study has been measured using three dependent variables namely; return on assets (ROA), return on equity (ROE) and growth in guest arrival over five years from 2012- 2017. The regression models considered in the study were applied to five practices that were identified as the most commonly adopted by all the seventy hotels surveyed in the study, including thirty- five luxury and thirty-five budget hotels, across selected Asian countries. The five practices namely, training and development, career development, performance appraisal, mentoring and recognition and awards, have been taken as independent variables in the model. The researchers have applied three different regression models in this study to measure the

relationship between talent development practices and their impact on organizational performance as a whole. Results showed that five major talent development practices explain 82 % variation in the value of Return on Asset, 27 % variation in the Return on Equity and 70 % variation in the Growth in guest arrival. Further, it was found that career development and performance appraisal are two key talent development practices which were found to be significantly related to all the three parameters used to measure the organizational performance of the luxury and budget hotels of Asia.

Hypothesis 1: There is no significant impact of training and development practices on the organizational performance of hospitality sector.

Training and development practices of luxury and budget hotel was found to be significantly and positively related to the Return on Assets, and Growth in guest arrival while it was found to have an insignificant relationship with the Return on equity. **Thus the null hypothesis is rejected** and it can be said that there is a significant impact of training and development practices on the organizational performance of hospitality sector in the region. Organizations use the practice of specific training and developmental programs to hone special set of skills or talent within the workforce.

This development method is characterized by attendance to corporate programs, executive education and formal education (Garavan et al., 2011). It is important to invest in human resources through training (Nafukho, 2004) in order to improve the competitive position of the firm. Training and developmental practices are programs other than that meant for career advancement, however. They are not intended as a step up in the hierarchy of power structure in an organization, but rather meant simply to introduce newer talents or develop existing ones to better quality. Training presents a prime opportunity to expand the knowledge base of employees which serves the organization in long term. Training programs are effective for increasing organizational performance by being affordable and highly visible methods, and customizable with instant returns (Clifford & Thorpe, 2007). The immediate benefits of the training and development practices to a workplace are improved employee performance, greater job satisfaction and morale in the workforce, addressing and eradicating weaknesses, reduced employee turnover and a substantial enhancement in company's reputation and brand equity. The quality of current workforce can be improved by organizations on providing comprehensive and updated training and development activities. Investment in training produces beneficial outcomes for any organization (Orpen, 1997). It is thus easily deduced that training and development practices can have a significant role to play in boosting organizational performance, particularly in hotel industry.

Hypothesis 2: There is no significant impact of career development practices on the organizational performance of hospitality sector.

Career development practices of luxury and budget hotel was found to be significantly and positively related to the Return on Assets, Return on equity and Growth in guest arrival. **Thus the null hypothesis is rejected** and it can be said that there is a significant impact of career development practices on the organizational performance of hospitality sector in the region. The concept of looking at an individual's career in its entirety and designing different sets of activities and relationships at each stage is called as career development (Wang & Noe, 2010). These are developmental assignments that promote employees to move their way upward in the organization. Such practices include exposure of employees to new challenges to uncover their potential, and tempt them towards developing talent to reach better professional heights. It requires a more deliberate use of lateral moves and temporary assignments in hopes of leader development (McCauley, 2004; Yost & Plunkett, 2009).

Pushing talent development to the side will negatively impact the overall organizational effectiveness and performance (Maycock & Ikuomola, 2015). Other practices include job rotations, job mobility and transfers, project assignments and real dilemma exposures. As per Natacha et al., (2014) these exposures provide talent with the opportunities to experience organizational, cultural and work practice situations. Challenging assignments result in practical, on-the-job learning (McCauley et al., 1998; DeRue and Wellman, 2009; Nyamori, 2015). It can hence be said that career development practices have a significant relationship with organizational performance.

Hypothesis 3: There is no significant impact of performance appraisal practices on the organizational performance of hospitality sector.

Performance appraisal practices of luxury and budget hotel was found to be significantly and positively related to the Return on Assets, Return on equity and Growth in guest arrival. **Thus the null hypothesis is rejected** and it can be said that there is a significant impact of performance appraisal on the organizational performance of hospitality sector in the region. Another important talent development practice that was seen to be adopted in all hotels surveyed in this study was performance appraisal systems. Appraisal and feedback systems have historically occurred as part of human interaction in organizations. It has majorly been used to furnish information about the company's immediate goals and to guide the employee's future behaviour in that regard. Honest feedback about one's behaviours, competencies, and impact on others is infrequent and inconsistent in many organizations.

However, effective feedback leads to a smooth flow of organizational goals from the top brass management to the employees, boosts creativity, promotes trusts, and drives motivation (Baker et al., 2013). With the hospitality sector being a highly labour intensive industry (Grobler & Diedericks, 2009), there is complete stress upon the need to ensure regular feedback mechanisms on an employee's performance. Hotels must introduce healthy performance appraisals that are inspiring to the employees for critically evaluating and raising the standards of their performance. There is a high positive correlation between performance appraisal and organizational performance.

Hypothesis 4: There is no significant impact of mentoring practices on the organizational performance of hospitality sector.

Mentoring practices of luxury and budget hotel was found to be significantly and positively related to the Return on Assets, while it was found to have an insignificant relationship with the Return on equity and Growth in guest arrival. **Thus the null hypothesis is rejected** and it can be said that there is a significant impact of mentoring practices on the organizational performance of hospitality sector in the region. The study has shown that mentoring is also a widely prevalent talent development practice in the hospitality industry. As per Mangusho et al., (2015), leadership strategies and skills are necessary to elevate the employee spirit and induct them into challenges of the job. This challenge results in developmental relationships like mentors and coaches that are supportive to the employee and aid in the development of talent, usually when in a new work environment. These relationships can be particularly powerful drivers of learning and development because they are a rich source of assessment, challenge and support (McCauley and Douglas, 2004). Mentorship can also be in form of work community-building (Boudreau et al., 2003; Wenger et al., 2002). Today mentoring is a common practice among companies to hone the talents of younger subordinates.

These relationships may be naturally occurring, arise through informal practices, or be intentionally developed through formal internship programs (Pittenger & Heimann, 2000). Many organizations have begun to adopt formal mentoring programs

as a way to develop their workforce (Douglas & McCauley, 2004). As per Allen and O'Brien (2006), prospective employees are more attracted to an organization with a formal mentoring program than to one without such a program.

Hypothesis 5: There is no significant impact of recognition and award practices on the organizational performance of hospitality sector.

Recognition and award practices of luxury and budget hotel was found to be insignificantly but positively related to the Return on Assets, Return on equity and Growth in guest arrival. **Thus the null hypothesis is accepted** and it can be said that there is no significant impact of recognition and award practices on the organizational performance of hospitality sector in the region. A common practice used by employers and managers in attempt to promote talent development is the recognition and award method. Under this method, employers present incentives of either financial nature such as high performance bonus or otherwise to motivate employees to perform better. This is a way to honour employees for their contribution into the organization and is supposed to boost their morale as well as productivity.

It involves the setting up of a well-framed criterion for awards. This criterion for awards must also be in tune with the organization's overall goals and missions. A company's recognition and award program may include professional benefit for employees, supervisors and student workers; as well as, formal and informal recognition methods. Some common criteria for rewards and recognition programs followed by companies are performance of the employee in a set period, effort contributed by the employee towards achieving organizational objectives, seniority and loyalty to the company's growth, portfolio of skills of the employee and the complexities of the tasks demanded from the employee. However, recognition and awards system often can lead to more harm than good. Researchers have found that high performance bonus systems are more likely to encourage misrepresentation of performance and other strategic behaviours than to recognize and motivate exceptional performance or performance improvements (Heinrich, 2007). In the light of these cons, it has been found that recognition and awards system is often detrimental to organizational performance and does not share a significantly positive relationship.

CONCLUSION

The objective of the present study has been three-fold; one, to identify the various talent development practices adopted for middle management in luxury and budget hotels; two, to measure the effectiveness of these practices from the perspective of managers and employers; and three, to identify if there exists a relationship between the effectiveness of talent development practices and overall organizational growth.

Researchers have chosen to conduct primary study across a total of 70 hotels across seven major Asian countries. The results of the study pointed out that there were a total of 25 widely identified practices across luxury and budget hotels, out of which 5 practices were found to be most commonly adopted. These five pervasive practices for talent development were; training and development of employees, career development opportunities, performance appraisal at regular intervals, proper mentoring, and recognition and awards for encouraging talented employees.

From the data collected from hotel managers, it can be concluded that talent development practices had greater effectiveness in luxury hotels as compared to budget hotels. Lastly, it can be concluded from the results of regression analysis that four out of the five identified talent development practices i.e. training programs, mentoring, performance appraisals and career development practices, had a

significant relationship with organizational performance, based on return on assets (ROA), return on equity (ROE) and growth in guest arrival over five years from 2012-2017. However, the practice of financial rewards and recognition system did not have a significant relationship with organizational performance.

PRACTICAL IMPLICATIONS

The study will be a helpful aid for hoteliers and managers to understand popularly practiced talent development strategies that are helpful to the growth of the organization. The study is of importance to recruiters and trainers to devise their talent development strategy that suits their organizations' purpose the best. The study highlighted that out of five major talent development practices namely; training & development, career development, performance appraisal, mentoring and recognitions and award, training & development and performance appraisal were found to have a positive and significant impact on the organizational performance.

Hence, hoteliers are suggested to focus on the training and development of their employees, which can make them more skilled and updated and it can boost their self-confidence, which will have a direct impact on their performance and on the overall organizational performance. Similarly; performance appraisal was considered as important practices, as employees whose performance are evaluated on regular basis and without any bias feel motivated and enthusiast to achieve their assigned targets, which leads to effective job performance and organizational performance too.

RESEARCH LIMITATIONS

The researchers have surveyed seven countries with major tourist destinations in Asian region, and chosen to ignore other countries that fall in this geographical ambit. For a wider understanding, hospitality sector in other countries may be studied by future researchers. The study may even be further expanded to pan-global level, and not merely Asia. The researchers have used regression model to analyze the impact of development practices on organizational performance. The researcher makes use of only three dependent variables or parameters in the regression model adopted in this study. Future researchers may be interested in exploring the relationship between talent development practices and organizational performance with addition of more parameters that are relevant to the study, such as retention rate and service quality variables.

REFERENCES

- Aguinis, H. & Kraiger, K. (2009). Benefits of training and development for individuals and teams, Organizations, and society. *Annual review of psychology*, 60, pp.451-474.
- Ahammad, S., (2013). Importance of Training in Hotel industry. Master's Thesis. Sodertorns University.
- Allen, T.D. & O'Brien, K.E. (2006). Formal mentoring programs and organizational Attraction. *Human Resource Development Quarterly*, 17(1), pp.43-58.
- Baker, A., Perreault, D., Reid, A. & Blanchard, C.M. (2013). Feedback and organizations: Feedback is Good feedback-friendly culture is better. *Canadian Psychology/Psychologie Canadienne*, 54(4), p.260.
- Barlow, L. (2006). Talent development: the new imperative? *Development and learning in Organizations: an international journal*, 20(3), pp.6-9.
- Baum, T. (2015). Human resources in tourism: Still waiting for change? –A 2015 reprise. *Tourism Management*, 50, pp.204-212.
- Benabou, C. & Benabou, R. (1999). Establishing a formal mentoring program for organizational Success. *National Productivity Review*, 18(2), pp.7-14.
- Berger, L.A. & Berger, D.R. (2003). The talent management handbook: Creating organizational Excellence through identifying developing and positioning your best people.

- Boudreau, J., Hopp, W., McClain, J.O. & Thomas, L.J. (2003). On the interface between operations and human resources management. *Manufacturing & Service Operations Management*, 5(3), pp.179-202.
- Brewster, C. (2007). Comparative HRM: European views and perspectives. *The International Journal of Human Resource Management*, 18(5), pp.769-787.
- Brown, P. & Tannock, S. (2009). Education, meritocracy and the global war for talent. *Journal of Education Policy*, 24(4), pp.377-392.
- Cascio, W. F. (2015). *Managing human resources*. McGraw-Hill.
- Cheese, P. (2008). Driving high performance in the talent-powered organization. *Strategic HR Review*, 7(4), pp.25-31.
- Claussen, J. Grohsjean, T., Luger, J. & Probst, G., (2014). Talent management and career Development: What it takes to get promoted. *Journal of World Business*, 49(2), pp.236-244.
- Clarke, R & Winkler, V. (2006). Reflections on Talent Management. London: CIPD.
- Clifford, J. & Thorpe, S. (2007). *Workplace learning & development: Delivering competitive Advantage for your organization*. Kogan Page Publishers.
- Coleman, J.S., (1987). Families and schools. *Educational researcher*, 16(6), pp.32-38.
- Delaney, J.T. & Huselid, M.A. (1996). The impact of human resource management practices on Perceptions of organizational performance. *Academy of Management journal*, 39(4), pp.949-969.
- DeRue, D.S. & Wellman, N. (2009). Developing leaders via experience: the role of developmental Challenge, learning orientation, and feedback availability. *Journal of Applied Psychology*, 94(4), p.859.
- Ellinger, A.D., Ellinger, A.E., Yang, B. & Howton, S.W. (2002). The relationship between the learning Organization concept and firms' financial performance: An empirical assessment. *Human resource development quarterly*, 13(1), pp.5-22.
- Ford, J., Harding, N. & Stoyanova Russell, D. (2010). Talent management and development. An Overview of current theory and practice.
- Frank, F.D., Finnegan, R.P. & Taylor, C.R. (2004). The race for talent: Retaining and engaging Workers in the 21st century. *Human Resource Planning*, 27(3).
- Garavan, T.N., Carbery, R. & Rock, A. (2012). Mapping talent development: definition, scope and Architecture. *European journal of training and development*, 36(1), pp.5-24.
- Gladwell, M., (2010). Talent grab: why do we pay our stars so much money? *New Yorker*, p.84.
- Grobler, P.A. & Diedericks, H. (2009). Talent management: An empirical study of selected South African hotel groups. *Southern African Business Review*, 13(3).
- Heinrich, C.J. (2007). False or fitting recognition? The use of high performance bonuses in motivating Organizational achievements. *Journal of Policy Analysis and Management: The Journal of the Association for Public Policy Analysis and Management*, 26(2), pp.281-304.
- Huang, T.C. (2001). The relation of training practices and organizational performance in small and Medium size enterprises. *Education+ Training*, 43(8/9), pp.437-444.
- Iles, P., Preece, D. & Chuai, X. (2010). Talent management as a management fashion in HRD: Towards a research agenda. *Human Resource Development International*, 13(2), pp.125-145.
- Kim, S. & McLean, G.N. (2012). Global talent management: Necessity, challenges, and the roles of HRD. *Advances in Developing Human Resources*, 14(4), pp.566-585.
- Kraimer, M.L., Seibert, S.E., Wayne, S.J., Liden, R.C. & Bravo, J. (2011). Antecedents and outcomes of organizational support for development: The critical role of career opportunities. *Journal of Applied Psychology*, 96(3), p.485.
- Latukha, M.O. (2018). Talent development and a firm's performance: Evidence from Russian Companies. *Journal of General Management*, 43(2), pp.51-62.
- Lawler, E.E. (2008). Strategic talent management: Lessons from the corporate world. *Strategic Management of Human Capital*, (5), pp.1-35.
- Lehmann, S. (2009). Motivating talents in Thai and Malaysian service firms. *Human Resource Development International*, 12(2), pp.155-169.
- Lewis, R.E. & Heckman, R.J. (2006). Talent management: A critical review. *Human resource Management review*, 16(2), pp.139-154.
- Lockwood, N.R. (2006). Talent management: Driver for organizational success. *HR magazine*, 51(6), Pp.1-11.
- Magd, H. (2003). Management attitudes and perceptions of older employees in hospitality Management. *International Journal of Contemporary Hospitality Management*, 15(7), pp.393-401.
- Malhotra, S. (2017). *Hospitality Industry in India: A Big Contributor to Economy's Growth*. BW-Business World. Published 16 May 2017. Accessed 13 November 2018.
- Mangusho, Y.S., Murei, R.K. & Nelima, E. (2015). Evaluation of Talent Management on Employees Performance in Beverage Industry: A Case of Delmonte Kenya Limited. *International Journal of Humanities and Social Science*, 5(8), pp.191-199.
- Mariela Natacha & Golik, Maria Rita Blanco, (2014) "Talent identification and development tools: Two to tango?", *Management Research: The Journal of the Iberoamerican Academy of Management*, Vol. 12 Issue: 1, pp.23-39, <https://doi.org/10.1108/MRJIAM-01-2013-0498>.

A Study to Identify Talent Development Practices in the Hospitality Sector and its Impact on Organizational Performance

- Maurer, T.J., Mitchell, D.R. & Barbeite, F.G. (2002). Predictors of attitudes toward a 360degree Feedback system and involvement in post feedback management development activity. *Journal of Occupational and Organizational Psychology*, 75(1), pp.87-107.
- Maycock, E.A. & Ikuomola, O.A. (2015). Learning and talent development: a review in Context. *International Journal of Advanced Research in Engineering & Management (IJAREM)*, pp.98-111.
- McCauley, C. & Douglas, C. (2004), "Developmental relationships", in McCauley, C. and Velsor, E (Eds), *The Center for Creative Leadership Handbook Leadership Development*, 2nd ed., Jossey-Bass, San Francisco.
- McCauley, C., Moxley, R. & Van Velsor, E. (1998), *TheCenter for Creative Leadership Handbook of Leadership Development*, John Wiley & Sons, San Francisco.
- McDonnell, A. (2011). Still fighting the "war for talent"? Bridging the science versus practice Gap. *Journal of Business and Psychology*, 26(2), 169-173.
- Michaels, E., Handfield-Jones, H. & Axelrod, B., (2001). *The war for talent*. Harvard Business Press.
- Nilsson, S. & Ellström, P.E. (2012). Employability and talent management: challenges for HRD Practices. *European Journal of Training and Development*, 36(1), pp.26-45.
- Nyamori, S. (2015). *The Effect of Workplace Mentoring on Employee Performance: A Case Study of SOS Children's Villages* (Doctoral dissertation, United States International University-Africa).
- Orpen, C. (1997). The effects of formal mentoring on employee work motivation, organizational Commitment and job performance. *The Learning Organization*, 4(2), pp.53-60.
- Pittenger, K.K. & Heimann, B.A. (2000). Building effective mentoring relationships. *Review of Business*, 21(1/2), p.38.
- Rhodes, C., Brundrett, M., & Nevill, A. (2008). Leadership talent identification and development: Perceptions of heads, middle leaders and classroom teachers in 70 contextually different primary and secondary schools in England. *Educational Management Administration & Leadership*, 36(3), 311-335.
- Rothwell, W.J. & Kazanas, H.C. (2004). *Improving on-the-job training: How to establish and Operate a comprehensive OJT program*. John Wiley & Sons.
- Scott, B. & Revis, S. (2008). Talent management in hospitality: graduate career success and Strategies. *International Journal of Contemporary Hospitality Management*, 20(7), pp.781-791.
- Scullion, H. & Collings, D. (2011). *Global talent management*. Routledge.
- Seibert, S. 1999. The effectiveness of facilitated mentoring: A longitudinal quasi-experiment. *Journal of Vocational Behavior*, 54(3), pp.483-502.
- Sheehan, M. (2012). Developing managerial talent: Exploring the link between management talent and Perceived performance in multinational corporations (MNCs). *European Journal of Training and Development*, 36(1), pp.66-85.
- Singh, D.A. (2018). Talent Management-A challenge for Indian Industries.
- Stahl, G.K., Björkman, I., Farndale, E., Morris, S.S., Paauwe, J., Stiles, P., Trevor, J. & Wright, P.M., (2007). Global talent management: How leading multinationals build and sustain their talent pipeline. *INSEAD faculty and research working papers*, 24 (1), p. 08.
- Stewart, J. & Harte, V. (2010). The implications of talent management for diversity training: An Exploratory study. *Journal of European Industrial Training*, 34(6), pp.506-518.
- Sumardi, W.A. & Othman, R. (2009). The three faces of talent management in Malaysia. *International Journal of Business Research*, 10(1), pp.181-185.
- Tansley, C. (2011). What do we mean by the term "talent" in talent management? *Industrial and Commercial training*, 43(5), pp.266-274.
- Thijssen, J.G.L. & van Heijden, B.D. (2003). Evaporated talent? Problems with talent development During the career. *International Journal of Human Resources Development and Management*, 3(2), pp.154-170.
- Wang, S. & Noe, R.A. (2010). Knowledge sharing: A review and directions for future Research. *Human resource management review*, 20(2), pp.115-131.
- Wenger, E., McDermott, R.A. & Snyder, W. (2002). *Cultivating communities of practice: A guide to Managing knowledge*. Harvard Business Press.
- Yost, P.R. & Plunkett, M.M. (2009). *Real time leadership development* (7 Edn). John Wiley & Sons.

Submitted:
14.05.2019

Revised:
27.09.2019

Accepted and published online
01.10.2019

MOTIVATIONAL SEGMENTATION OF THE GASTRONOMIC TOURIST IN THE CITY OF CÓRDOBA (SPAIN)

Javier JIMÉNEZ-BELTRÁN

University of Cordoba, Faculty of Law and Business and Economic Sciences, Department of Applied Economics; c/ Puerta Nueva s/n 14002 Cordoba, Spain, e-mail: fjbeltran@uco.es

Carol JARA-ALBA

Casa Grande University, Department of Research,
Guayaquil 090613, Ecuador, e-mail: cjara@casagrande.edu.ec

Jaime ROLDAN NOGUERAS

University of Cordoba, Faculty of Law and Business and Economic Sciences, Department of Applied Economics; c/ Puerta Nueva s/n 14002 Cordoba, Spain, e-mail: dtironoj@uco.es

Gema GOMEZ-CASERO*

University of Cordoba, Faculty of Law and Business and Economic Sciences, Department of Applied Economics; c/ Puerta Nueva s/n 14002 Cordoba, Spain, e-mail: ggomezfuentes@uco.es

Citation: Jiménez-Beltrán, J., Jara-Alba, C., Roldán Nogueras, J., & Gomez-Casero, G. (2018). MOTIVATIONAL SEGMENTATION OF THE GASTRONOMIC TOURIST IN THE CITY OF CÓRDOBA (SPAIN). *GeoJournal of Tourism and Geosites*, 26(3), 874–886. <https://doi.org/10.30892/gtg.26316-404>

Abstract: The objective is to analyze the motivations of tourists who visit a city with a rich cultural heritage, both architectural and culinary. Based on these motivations, segmentation is carried out. Regarding the methodology, after a factorial analysis and taking the extracted motivational dimensions as reference, the multivariate technique of grouping the cases was used, obtaining four clusters. Findings show that tourists of Córdoba are attracted to gastronomic features in addition to architectural heritage, together forming a cultural product that is highly valued. The article also analyzes neophilia and neophobia.

Key words: gastronomy, motivation, neophobia, neophilia, tourism segmentation, gastronomic tourism, food tourism.

* * * * *

INTRODUCTION

When tourists travel they do not want to experience only what they have already seen or read. The new tourist seeks experiences and unique and particular aspects of the destination; the tourist is not only interested in knowing the tangible heritage but also wants to live it and deepen the knowledge of the other elements that make up the place

* Corresponding author

(López-Guzmán et al., 2019). According to Matlovičová, Kolesárová & Matlovič (2014), culinary tourism can be considered also tours where the activities associated with food tasting are of the secondary importance. Following Madaleno et al. (2016), tourism evolves from the classic contemplation of physical places towards more experiential activities where it is possible to discover, participate, and learn from the place. Specifically, cultural tourism today is not just about maximizing assets of a tangible nature (visiting museums, historical sites, or art galleries). It also includes, for example, knowledge of the dishes and gastronomy that characterize a region (Huang, 2017).

This fact is relevant because through culinary practice it is possible to know the culture of a destination in a close and participatory way, far from the contemplative perspective that has traditionally characterized cultural tourism. In this context, the tourist interested in gastronomy investigates new products and forms that respond to the tourist's tastes, since the motivations to visit a destination are constantly evolving (Lin & Chen, 2014). In this way, the objective of this study is to analyse the motivations of tourists who come to a city with a rich cultural heritage, not only from an architectural point of view but also a culinary one. Based on this analysis, the study will carry out a segmentation. In addition, personality traits will be analysed. To achieve this goal, the article is structured as follows. The next section provides a review of the literature, followed by the methodology, the results of the investigation, and conclusions.

LITERATURE REVIEW

Following Björk and Kauppinen-Räsänen (2016), there are three types of tourists in relation to gastronomy and gastronomic motivations. First there are those who travel with the sole purpose of experiencing the gastronomy (including drinking) of a destination. They have a real interest in the culinary experience, and this works as a trigger for the choice of destination. Then there are those who perceive the gastronomic experience as something important and offering an exclusive experience, but not an essential one, for the choice of the visited destination. In terms of motivation, the gastronomic experience is combined with the cultural experience of a destination for the pursuit of personal enrichment (Kim & Kim, 2017). For example, tourists might take a trip to discover the architectural heritage of a destination while tasting the typical cuisine as part of the experience (Akdag et al., 2018). Third are those tourists who approach the gastronomy in a destination only to the extent that it represents a physical need to satisfy. For them, gastronomy is part of the daily practices of any tourist in the place of visit, since it is a basic physiological requirement (Lin & Chen, 2014; Chen & Huang, 2018).

However, we must not forget that although eating is a daily and common activity, experiencing moments of satisfaction is important for the tourist experience, so local gastronomy can be key to that objective, although it does not represent an initial motivation (Oh et al., 2018). Although local gastronomy is not the only reason for choosing a destination (Privitera, et al., 2018), there is a segment of tourists who want to deepen their knowledge and enjoy their tasting (while relaxing). According to different researchers (Yusuf, 2017; López-Guzmán et al., 2017, 2018), these tourists must also be considered gastronomic. Therefore, the present investigation considers relevant the adoption of the terminology provided by the World Tourism Organization (WTO, 2012) to designate gastronomic tourists who plan their trips, partially or totally, to taste and/or participate in activities related to the ingredients and dishes of a destination.

The gastronomic motivation

The tasting of specialties is, on certain occasions, the main attraction to visit a destination (Wang & Mattila, 2015). In the analysis of tourism motivations, one of the

most accepted classifications is based on the push–pull theory (Crompton, 1979; Anton et al., 2017). Anton et al. (2017) considered that the existence of internal motivations (push) shows a connection with individuals' emotions and corresponds to their desires and stimuli, along with the wish for escape, relaxation, rest, novelty, and having a cultural experience. The external reasons (pull) are related to the attractiveness of the destination, which includes tangible resources such as historical, cultural, natural, or culinary heritage. In essence, push motivations induce individuals to make the trip, while pull factors relate to the appeal of the destination, motivating them to travel to it once the decision has been made. Culinary heritage has both roles: individuals are pushed beyond the ingredients and dishes that are known and familiar, and at the same time they are pulled to experience novel and exciting tastes (Fields, 2002).

As indicated above, local gastronomy plays a fundamental role in the choice of destination (Fields, 2002; Son & Xu, 2013). Following Fields (2002), four dimensions influence tourists' motivation to approach the local culinary heritage: physical (the pleasure of tasting an essential dish); cultural (the possibility of knowing a place through its products and typical dishes); interpersonal (a pleasant lunch with company is pleasant and relaxing, and allows socialization); and status and prestige (visiting a restaurant of recognized value is associated with having a certain economic and social level). Based on these categories, Kim et al. (2009) developed nine dimensions that, in their opinion, intervene in the composition of a culinary motivational model: acquisition of knowledge, authentic experience, union, prestige, exciting experience, escape from routine, sensory attraction, concern for health, and physical environment. After the investigation by Kim et al. (2009), a new scale of motivation was developed, which reduced the initial nine components to five (cultural experience, interpersonal relationship, emotion, sensory appeal, and healthy attractiveness) to integrate a local gastronomic tasting model (Dimitrovski & Crespi-Vallbona, 2016; Maeng et al., 2016). Then each of the dimensions was developed, as well as the contributions that took place. First, cultural experience results from integrating knowledge acquisition and authentic experience. The acquisition of knowledge is oriented to the need to share the local culinary culture as an opportunity to learn about a different culture, while connecting with the intangible heritage of the destination (Björk & Kauppinen-Räsänen, 2016).

Secondly, the motivation of interpersonal relationship incorporates union and prestige. A tourist destination can be a meeting place that provides a unique opportunity for family members and other traveling companions with similar interests (Xu & Zhang, 2016). In this context, the tasting of local specialties is recognized as a collection of social practices that allow tourists to interact (Kim et al., 2013; Sthapit, 2017). For example, a lunch on a holiday contains a social function that includes the construction of new ties while reinforcing existing ones (Goolaup & Mossberg, 2017). Third, the approach to local gastronomy is accepted as a way of escaping from the routine at the same time that it is an exciting experience, both united under the factor of emotion (Tanford & Jung, 2017). Sometimes it is fundamental to distance oneself from everyday reality as an effective tool to avoid the repetitive aspects that life offers (Kim et al., 2013). Thus, the incursion into local markets and typical culinary establishments, normally different from those visited regularly, allows us to take perspective and also to experience unique sensations (Sthapit et al., 2017) since the affective responses (disappointment, joy, surprise, etc.) are evoked during the course of gastronomic experiences (Yusuf, 2017).

Fourth, the dimension of sensory appeal is defined by the need to experience, through touch, smell, visual appearance, or taste, the diversity associated with the gastronomic heritage (Björk & Kauppinen-Räsänen, 2016). Here the visual images of the

ingredients and dishes, along with the preparation, play a preponderant role in the attraction and pleasantness (Hanks et al., 2016), which establishes culinary preferences based on the nuanced sensory experience (Ting et al., 2017; Yusuf, 2017). Finally, the healthy dimension is included because, among the characteristics that are recognized under quality culinary heritage, the presence of ingredients and local dishes stands out, resulting in their tasting as a means to improve mental or physical well-being (Kim et al., 2009; Kim & Eves, 2014; Madaleno et al., 2016; Choe & Kim, 2018). Kim et al. (2009) found that women and older people (with higher educational levels) showed greater concern for their health and had a greater desire to experience the local culture through tasting. Table 1 shows the evolution of the motivational dimensions (from nine to five).

Table 1. Grouping of motivational dimensions

LOCAL GASTRONOMIC MOTIVATION DIMENSIONS		
Kim et al., 2012	Kim et al., 2009	Scientific studies (year)
Cultural experience	Acquisition of knowledge	Mynttinen et al., 2015; Björk and Kauppinen-Räsänen 2016; Sthapit 2017; Özdemir and Seyitoğlu 2017
	Authentic experience	
Interpersonal relationship	Union	Kim et al., 2013; Mynttinen et al., 2015; Xu and Zhang 2016; Tanford and Jung 2017; Sthapit 2017; Goolaup and Mossberg 2017
	Prestige	
Emotion	Exciting experience	Björk and Kauppinen-Räsänen 2016
	Escape the routine	
Sensory attraction	Sensory attraction	Ting et al., 2017; Yusuf 2017; Björk and Kauppinen-Räsänen 2017
Healthy	Concern for health	Seo and Yun 2015; Wang and Mattila 2015; Wu et al., 2016; Madaleno et al., 2018

In accordance with the review of the literature, the hypotheses are the following:

H₁: Motivations related to the cuisine of a destination, in this case the city of Córdoba, are heterogeneous (Kim et al., 2013; Dimitrovski & Crespi-Vallbona, 2016; Maeng et al., 2016). H₂: Tourists can be classified according to their interest in gastronomy (Matlovičová & Pompura, 2013; Björk & Kauppinen-Räsänen, 2016; López Guzmán et al., 2017, 2018; Privitera et al., 2018).

Traits associated with the gastronomic personality

In general, the tasting of specialties in a destination is characterized by its essentiality (tourists need to feed themselves), temporal scope (the stay is limited in duration), symbolic character (which can motivate the approach to a destination), and in many cases novel scenario in terms of ingredients and customs (Mak et al. 2013; Ting et al. 2017). This aspect is essential in terms of the reaction (positive or negative) that the tourist may have to a culinary heritage that, in addition to being far away, may generate suspicion or fear (Kim et al., 2010; Mynttinen et al. 2015). Recent research has confirmed how the personality traits of the individual affect the intentions of tasting local cuisine in different parts of Asia, including Hong Kong (Mak et al., 2017), Macao (Ji et al., 2016), Antalya (Caber et al., 2018), and Taiwan (Hsu et al., 2018).

Personality trait: neophobia

Neophobia, related to the behaviour of the tourist before the gastronomic choice, is based fundamentally on a tendency to avoid or restrict the choices of new flavours and local textures that sometimes have an uncertain origin (Sthapit, 2017). This is not an isolated event, and it has importance in the field of tourism, affecting the development of the culinary heritage and, by extension, the local economy of the destination (Kim et al., 2010;

Wu et al., 2016). Therefore, three aspects stand out. In the first place, the cultural aspect is decisive, especially when the visit happens abroad, exerting great influence on tourists' perceptions and valuations. Of particular importance are flavours, ways of cooking, and learning new techniques or table manners (Kim et al., 2013; Choe & Kim, 2018). How gastronomy is codified into acceptable or unacceptable, within a particular social group, depends on beliefs and values (Mak et al., 2017; Muhammad et al., 2016). Thus, what is understood as acceptable in one culture can be harmful and negative in another. For example, there are tourists who are upset by the presence of aquariums installed in Asian restaurants (essentially China, Hong Kong, and Korea), displaying various species of fish that will be slaughtered and prepared according to the preferences of the diners (Cohen & Avieli, 2004). Another example is internal organs, which in many destinations are unacceptable and in others are valued positively in regard to taste, nutrition, and health. One's affective response to a destination in comparison with one's own culture is also important; for example, Westerners often choose exotic destinations perceived as mysterious and at times dangerous (Cohen & Avieli, 2004; Madaleno et al., 2018).

Second, prior contact and familiarity with the local culinary heritage contribute to reducing the neophobic traits of tourists (Seo et al., 2013; Frisvoll et al., 2016). The proximity or knowledge of ingredients and dishes is a good predictor of taste assessment (Jang & Kim, 2015); neophobes tend to avoid things when they are unknown (Björk & Kauppinen-Räsänen, 2016). Therefore, food purveyors must follow different strategies: opt for visibility by providing stands or displays of the specialties available in the restaurant, or provide free samples, which may motivate the consumer to make a purchase. In both cases, the tourist becomes familiar and has an increased probability of tasting (Mak et al., 2012; Özdemir & Seyitoğlu, 2017). For first-time visitors to a destination, previous experience positively affects the culinary choice (Youn & Kim, 2018) as well as having influence over successive visits (Wijaya et al., 2016).

The tasting of specialties can be achieved without having to travel thanks to two reasons: the unstoppable process of globalization makes specialties available anywhere in the world, and in addition, the greater availability of ethnic restaurants in the countries of origin of the tourist gives them the possibility to experience international gastronomy (Seo et al., 2013; Chavarria & Phakdee-Auksorn, 2017). Both aspects improve the potential knowledge of the tourist even before going to the destination (Mak et al., 2012; Madaleno et al., 2018). In essence, contact with the culinary heritage before and during the visit improves tourists' knowledge and influences the tasting in a positive way (Youn & Kim, 2018). Third, lack of information on local specialties' characteristics sometimes leads to situations that are harmful to establishments (Kim et al., 2009; Mak et al., 2017; Wu et al., 2016). Sometimes local gastronomy is seen only from the perspective of problems such as hygiene, unknown flavours, and strange ingredients that are an obstacle to enjoyment (Lee & Scott, 2014; Caber et al., 2018). To avoid this situation, it is important to provide information in various areas.

Personality trait: neophilia

Experiences related to local gastronomy can provoke a variety of feelings for those who move from unpleasant and uncomfortable reactions to pleasurable and fascinating sensations (Cohen & Avieli, 2004; Wu et al., 2016). Scholars have found that the tourist is in a continuous search for gratification (Dimitrovski & Crespi-Vallbona, 2016), and the local culinary heritage provides intense and immediate sensorial stimuli that contribute to the tourist's experience, even to a greater extent than other attractions (Poria et al., 2013). This includes the satisfaction of discovering a new specialty that is not routinely tasted (Madaleno et al., 2018). Those who have a positive intention regarding local

culinary customs during their visit and value these experiences are tourists of neophilic traits (Kim et al., 2010; Özdemir & Seyitoğlu, 2017). Establishing a relationship between motivation and personality traits, it is possible to quantify tourists into two large groups: a) those who show a neophobic attitude (rejection) have little or no interest in participating in activities related to gastronomy (including tasting); and b) those who show a neophilic behaviour (acceptance) wish to participate in and enjoy the culinary heritage (Dimitrovskia & Crespi-Vallbona, 2016; Madaleno et al., 2016; Hsu et al., 2018). In essence, gastronomic tourism as a modality can be considered a maximum experience when, in addition to perceiving local specialties in an authentic way and as a symbol of local culture, there is a receptive and conducive behaviour for tasting (Mak et al., 2017).

In accordance with the literature review, we propose two additional hypotheses:

H₃: Gastronomic motivations and neophilic personality traits are related in a positive way (Mak et al., 2012; Seo et al., 2013; Wang & Mattila, 2015; Ji et al., 2016; Madaleno et al., 2018; Chen & Huang, 2018).

H₄: Gastronomic motivations and neophobic personality traits are inversely related (Seo et al., 2013; Wang & Mattila, 2015; Ji et al., 2016; Madaleno et al., 2016; Muhammad et al., 2016; Choe & Kim, 2018).

METHODOLOGY

The methodology used in the present investigation contributes to deepen the knowledge of the culinary profile of the tourist who visits the city of Córdoba as a recognized cultural destination. We analysed two essential factors: culinary motivations and personality traits (neophobia and neophilia) of the individual associated with gastronomy. The field work took place in selected catering establishments that met the following requirements: wide acceptance by tourists visiting the city's Jewish Quarter (and Historic Quarter) and cuisine that reflects the locality. Diners tasted dishes and then were given a questionnaire to complete afterward (allowing for anonymity).

In this context, the survey is an effective data-collection tool that has been used in previous research (Kim et al., 2013; Björk & Kauppinen-Räsänen, 2016). The survey was conducted between May 2014 and January 2015 and was distributed in four languages (English, French, German, and Spanish). A total of 1,014 valid surveys were obtained, of which 568 corresponded to nationals and 447 to international tourists. A mix of technical issues was examined through a 5-point Likert scale to assess perceptions, along with questions with yes/no answers and others with closed questions. SPSS software v. 23 was used for the statistical analysis of data. Factorial analysis was carried out (analysis of main components) using as reference the culinary motivational dimensions and incorporating the multivariate technique of grouping cases. Essential statistical techniques were applied: Cronbach's alpha statistic, K-means clusters, and analysis of variance (ANOVA) by nonparametric test.

RESULTS

Motivations associated with the local cuisine during the stay at the destination

A factorial analysis of the scale of attributes was performed to identify a small number of explanatory factors for tourists' intentions, resulting in four motivational dimensions related to local gastronomy (Table 2). Although we focus on the factorial scores derived from these components to establish the motivational strength of each visitor, we also need to characterize the four dimensions. Thus, we obtained 18 items to assess the culinary motivation of the destination. As shown in Table 2, the value of the

sample adequacy of Kaiser-Meyer-Olkin (KMO) was 0.907 and the Bartlett Sphericity Test was 7,614.737 with a significance level equal to 0.000. Both results indicate the appropriateness of performing factor analysis. For the extraction of dimensions, principal components analysis with varimax rotation was used, assigning which items corresponded to each dimension. The result of four components explained 61.516% of the total variance. The factorial analysis showed an indirect indicator of the relevance that the different motivational dimensions represented for the respondents.

Table 2. Factorial matrix, rotated components - Culinary motivations in the city of Córdoba –

Motivational aspects	Components				Motivational dimensions
	1	2	3	4	
To learn what this local food tastes like		0.532			Cultural
Offers a unique opportunity to understand local culture		0.732			
To discover something new		0.782			
To increase my knowledge about different cultures		0.748			
An authentic experience		0.652			
Helps me to relax				0.747	Emotional
Takes me away from the crowds and noise				0.783	
Is different from what I normally eat				0.525	
Talking to everybody about my local food experiences			0.663		Interpersonal
Having local food increases friendship or kinship			0.682		
Giving advice about local food experiences to people who want to travel			0.756		
Enables me to have an enjoyable time with friends and/or family			0.694		
Smells nice	0.677				Sensory-Healthy
Tastes good	0.681				
Looks nice	0.744				
Is nutritious	0.767				
Contains a lot of fresh ingredients produced in a local area	0.752				
Keeps me healthy	0.763				
Eigenvalues	3.688	2.972	2.577	1.835	
% variance explained	20.491	16.512	14.317	10.196	
% variance cumulative	20.491	37.003	51.319	61.516	
KMO	0.907				
Bartlett's test of sphericity	Chi-cuadrado = 7,614.737 sig < 0.001				
Extraction method: Principal Components Analysis. Rotation method: Varimax with Kaiser					

In order of importance, the first dimension is called sensory-healthy and is related to the appreciation of the local cuisine for its sensory characteristics (pleasant smell, visual appeal) and for a greater use of fresh and nutritious ingredients, compared to other dishes. The importance of this dimension by itself explained 20.491% of the total variance of the motivation matrix, with a value of 3.688.

The second extracted dimension, cultural, forms the most traditional and identifying part of the visited destination, a reflection of the received cultural heritage.

It had an eigenvalue of 2.972, describing 16.152% of the total variance. The third dimension, interpersonal, results from the ability to provide pleasant moments with family and/or friends, reinforcing the bonds of union. It explained 14.137% of the total variance of the motivation matrix, with a value of 2.577. The last extracted dimension, emotion, is related to the opportunity to relax, differentiated from everyday activities, during the gastronomic experience. It obtained an eigenvalue of 1.835, describing 10.196% of the total variance. Regarding the reliability of the questionnaire, the Cronbach's alpha coefficient of the final scale of the 18 items had a value of 0.901, indicative of meritorious internal consistency among elements.

Table 3. Characterization of the segments according to the motivations

	Gastronomic clusters				Average	H-Kruskal Wallis		
	1	2	3	4		χ^2	Sig.	
Cultural motivation (average)								
To learn what this local food tastes like	2.89	4.10	4.53	4.03	2.89	214,478	< 0.000	
Offers a unique opportunity to understand local culture	2.11	3.88	4.06	3.87	3.63	266,569	< 0.000	
To discover something new	2.30	4.08	4.03	4.09	3.76	228,234	< 0.000	
To increase my knowledge about different cultures	2.37	3.97	3.87	4.05	3.69	207,580	< 0.000	
An authentic experience	2.08	3.47	3.65	3.98	3.46	231,183	< 0.000	
Emotional motivation (average)								
Helps me to relax	2.11	2.39	2.28	3.92	2.84	359,377	< 0.000	
Takes me away from the crowds and noise	1.96	1.96	1.99	3.74	2.59	403,970	< 0.000	
Is different from what I normally eat	2.31	2.96	3.23	3.90	3.26	169,514	< 0.000	
Interpersonal motivation (average)								
Talking to everybody about my local food experiences	1.89	2.27	3.25	3.48	2.92	231,959	< 0.000	
Having local food increases friendship or kinship	2.18	2.18	3.46	3.62	3.06	234,569	< 0.000	
Giving advice about local food experiences to people who want to travel	2.29	2.41	3.53	3.65	3.15	192,870	< 0.000	
Enables me to have an enjoyable time with friends and/or family	2.66	3.09	4.11	3.94	3.61	146,396	< 0.000	
Sensory-healthy motivation (average)								
Smells nice	2.80	2.65	4.21	3.92	3.58	248,790	< 0.000	
Tastes good	3.26	3.31	4.55	4.08	3.93	210,024	< 0.000	
Looks nice	3.10	2.84	4.31	4.11	3.76	227,844	< 0.000	
Is nutritious	2.93	2.12	3.92	3.82	3.39	271,183	< 0.000	
Contains a lot of fresh ingredients produced in a local area	3.08	2.55	4.15	3.96	3.61	227,134	< 0.000	
Keeps me healthy	3.00	2.22	4.01	3.80	3.43	258,648	< 0.000	

This coefficient reaches positive values between 0 and 1, where zero shows total absence of internal consistency, and a total redundancy between the items, providing a valid result. In addition, the critical level (p) associated with Friedman's statistical χ^2 (2,102.152) of the analysis tests the null hypothesis (the set of elements of the scale has the same mean is less than 0.001), rejecting the hypothesis that the means of the

elements are the same. These results confirm the existence of different gastronomic motivational factors during the visit. Thus, H1 is accepted.

Segmentation of the sample according to gastronomic motivations to visit the destination

The study of the dimensions carried out provides foundations to establish a segmentation of tourists who visit Córdoba. A non-hierarchical conglomerate analysis was performed with the factorial scores of the four dimensions analysed (sensory-healthy, cultural, interpersonal, and emotion). In this context, cluster analysis is a multivariate technique that allows grouping the variables based on their similarity.

In maximizing the variance between typologies and minimizing the variance in the set of each typology, the optimal solution that reaffirms the criteria is that which introduces four conglomerates. To this end, test H of Kruskal-Wallis (1952) was carried out. Unlike the F statistic of the ANOVA does not need to establish the assumptions of normality and equality of variances of the variables for possible groupings (two, three, and four segments), reaffirming that the solution that optimizes the values of the Kruskal-Wallis statistic is in four conglomerates. Table 3 shows the characterization of different clusters from the means of the 18 items considered to measure the culinary motivations of the destination. It must be taken into account that the Kruskal-Wallis statistic II allows to contrast that the averages compared are not equal between different clusters. However, it does not confirm where the observed differences are located.

The incorporation of the Mann-Whitney U statistic (1947) allows us to know which mean differs from another. The first cluster, made up of 168 visitors (17.28% of the sample), is the least numerous and the one that has the lowest scores in all dimensions. This cluster is called a non-gastronomic tourist, and it can be affirmed that its relationship with the local gastronomy is merely physiological. The second cluster presents significant values in the cultural dimension, noting low values in the rest. These individuals are designated as cultural gastronomic tourists, since the tasting of local dishes is an important vehicle to know and understand the culture of the region visited, according to the scientific literature (López-Guzmán et al., 2017). The cluster ranks second in volume of tourists (178), or 18.31% of respondents. The third cluster presents significant values in three of the dimensions, reaching a good score in sensorial factor-healthy and cultural, and acceptable in the interpersonal dimension. The cluster is called gastronomic tourist started because culinary motivations are perceived as better and more easily recognized (i.e., cultural and sensory-healthy value traditionally associated with local cuisine); it subtly values the ability to relate to others around a specialty. The third cluster was represented by 287 visitors, or 29.53% of respondents. The fourth cluster presents significant values in all dimensions and is named full gastronomic tourist, connecting with the set of culinary motivations analysed.

Here, the visitor values the gastronomic heritage as part of the culture of the destination, values the health aspects, and is also in search of new experiences that meet social and interpersonal needs. This is the most important cluster in number of tourists (339), representing 34.88% of respondents. To verify the correctness of the segmentation, tourists were questioned about the importance of gastronomy as a general reason for the visit to Córdoba. In the subsequent analysis, statistically significant differences were observed between the segments (statistical H of Kruskal-Wallis = 82,157, $p = 0.000$).

The gamma coefficient showed a direct relationship between gastronomy as the main reason to visit the city and the gastronomic tourist (cluster 4) (0.376, $p = 0.000$). The Mann-Whitney statistic was used to establish the differences between segments. Since the critical level associated with both statistics was less than 0.05, the null hypothesis was

rejected. In addition, the difference in the medians of the populations was statistically significant for the set of dimensions. The results were validated through a discriminant analysis to determine what percentage of the sample was correctly assigned. The result indicated validity (95.1% of tourists correctly assigned). However, of the total number of individuals (339) in the full culinary cluster, there are four that the analysis locates in the non-gastronomic cluster, six in the cultural gastronomic and three in the gastronomic started cluster. In short, the set of dimensions presented differences between clusters, showing that those tourists with greater interest in local gastronomic tasting reached higher values in the four motivational dimensions analysed. Therefore H2 is accepted.

Personality traits associated with gastronomy: neophilia and neophobia

The construction of a local tasting model implies the integration of internal constructs. In this context, personality traits related to gastronomy were measured with a 5-point Likert scale (1 = very little satisfied, 5 = very satisfied).

Regarding the different personality traits of the respondents, a total of 11 items were selected to determine the relative importance of a series of reasons that influenced their decision to taste local ingredients and dishes. The items were grouped into two dimensions: neophilia (favourable attitude to taste the local cuisine) and neophobia (rejection of it). The six items of neophilia presented meritorious internal consistency, with a Cronbach's alpha of 0.815. In addition, the critical level (p) associated with Friedman's statistical χ^2 406,556 was less than 0.001, showing that the means of the elements were not equal. For questions related to neophobia, the items were tabulated by considering that the relevant aspects had a lower score. The five items of neophobia presented meritorious internal consistency, with a Cronbach's alpha of 0.775.

In this case, the critical level (p) associated with Friedman's statistical χ^2 90,067 was less than 0.001, showing that the means of the elements were not equal. The neophilia dimension had an average value of 3.73. The best rated items were "I like trying new ethnic restaurants" and "When I travel I'm excited to try local food". The neophobia dimension had an average score of 2.46. "I am afraid to eat things I have never had before" and "If I do not know what food is, I'm not going to try it" were highlighted items.

Table 4. Analysis of personality traits in segments

Personality dimensions	Gastronomic segments				H-Kruskal Wallis	
	Non-gastronomic	Cultural	Gastronomic started	Full	χ^2	Sig.
Neophilia	3.06 ^(*)	3.63 ^(*)	3.92	3.90	105.584	< 0.000
Neophobia	2.50	2.19	2.33	2.66	31.260	< 0.000
(*) Values in bold present significant differences in three out of four of the means clusters. The U-Mann-Whitney test was applied to test for significant differences between the different means						

The analysis by clusters allows us to contrast the existence of significant differences for each of the personality dimensions. The segments with the highest culinary value (gastronomic tourist started) recorded the highest values in the neophilia dimension, reinforcing the intention to taste local specialties. The cultural cluster presented acceptable values, while the non-gastronomic cluster registered the lowest levels of the dimension, implying that it is not related to this personality trait. The gamma coefficient revealed the existence of a significant and direct relationship between neophilic and full gastronomic tourists (0.266, $p = 0.000$). With these results, H3 is accepted. Table 4

shows the different clusters and dimensions associated with the personality traits. Regarding the neophobia dimension, the assessments were low for the four groups, indicating that there were no significant levels. Therefore, H4 is rejected.

CONCLUSION

The analysis allowed the identification of four dimensions depending on gastronomic motivation: sensory-healthy, emotion, interpersonal, and cultural. Based on these, four segmenting typologies were established and validated: non-gastronomic tourist, cultural gastronomic tourist, gastronomic tourist started, and full gastronomic tourist. The non-gastronomic tourist has little relation with any gastronomic dimension. The cultural gastronomic tourist obtains high scores in items related to the cultural dimension. The gastronomic tourist started achieves the highest scores in the items related to the cultural and sensory-healthy dimension (most recognized aspects of gastronomy). Finally, the full gastronomic tourist presents the highest values in all items (sensory-healthy, cultural, emotion, and interpersonal). In short, this tourist values the aspects associated with local gastronomy as well as the use of fresh ingredients, how they reflect part of the culture of the city, and the opportunity to socialize and enjoy the tranquillity that the environment provides. In short, tourists can be classified significantly depending on their interest in local cuisine. Once the clusters were designated, other internal constructs (personality traits) were incorporated. The gastronomic motivations and the personality traits are related. Thus, tourists with high gastronomic motivation have neophilic features (favourable attitude to taste unknown ingredients and dishes). It is not possible to confirm that individuals with less gastronomic motivation possess greater neophobic traits (refusal to taste local gastronomy). The main practical application of this research was to take a step further in the knowledge of tourism demand, expectations, and preferences in order to design products and services and strategies that best meet their needs. Córdoba is integrated into a region endowed with resources and tourist attractions, so that public administrations and the local business community must bet firmly on this sector to provide for socioeconomic development of a city that needs to raise the levels of employment and consolidate the well-being of its citizens. The city needs to integrate quality tourism (such as that which represents the gastronomic field) and be respectful of the architectural heritage and local customs, in a climate of absolute coexistence. Two recommendations should be highlighted:

- Take advantage of the good image of the local culinary heritage to promote and consolidate the city of Córdoba as a cultural destination. In addition, take advantage of the complementarity that gastronomy, as a resource, offers with other projects. In this context, it is possible to explore the feasibility of new proposals that relate restoration with other elements of local culture, such as archaeology or architectural heritage. In other words, investigate the transversal possibilities that gastronomy offers in the tourist context.

- To boost the local and regional economy, the cooperation of all responsible actors should be channelled, relating to the effective implementation of gastronomic offerings of the city as well as to effective marketing of a brand image.

Because the main limitation of this investigation is that it represented a short duration, it would be helpful to extend the research to full-year tourism in the city. This empirical research applied a combination of theory and practice to the gastronomic field in an attempt to understand the tourism context in Córdoba.

Based on the results, it is possible to identify lines of action and recommendations to be considered for the consolidation of this sector. One proposal is to make a comparison between national and international tourists in an attempt to analyse the motivations of the different segments according to their origin, in order to better understand the demand of tourists who opt for this destination.

REFERENCES

- Akdag, G., Guler, O., Dalgic, A., Sercan, B., & Cakici, A. C. (2018). Do tourists' gastronomic experiences differ within the same geographical region? A comparative study of two Mediterranean destinations. *British Food Journal*, no. 120, vol. 1, p. 158–171.
- Antón, C., Camarero, C., & Laguna-García, M. (2017). Towards a new approach of destination royalty drivers: Satisfaction, visit intensity and tourist motivation. *Current Issues in Tourism*, no. 20, vol. 3, p. 238–260.
- Björk, P., & Kauppinen-Räsänen, H. (2016). Local food: A source for destination attraction. *International Journal of Contemporary Hospitality Management*, no. 28, vol. 1, p. 177–194.
- Caber, M., Yilmaz, G., Kiliçarslan, D., & Öztürk, A. (2018). The effects of tour guide performance and food involvement on food neophobia and local food consumption intention. *International Journal of Contemporary Hospitality Management*, no. 30, vol. 3, p. 1472–1491.
- Chavarria, L. C. T., & Phakdee-auksorn, P. (2017). Understanding international tourists' attitudes towards street food in Phuket, Thailand. *Tourism Management Perspectives*, no. 21, p. 66–73.
- Chen, Q., & Huang, R. (2018). Understanding the role of local food in sustaining Chinese destinations. *Current Issues in Tourism*, no. 22, vol. 5, 544–560.
- Choe, J. Y. J., & Kim, S. S. (2018). Effects of tourists' local food consumption value on attitude, food destination image, and behavioral intention. *International Journal of Hospitality Management*, no. 71, p. 1–10.
- Cohen, E., & Avieli, N. (2004). Food in tourism: Attraction and impediment. *Annals of Tourism Research*, no. 31, vol. 4, p. 755–778.
- Crompton, J. L. (1979). Motivations for pleasure vacation. *Annals of Tourism Research* 6 (4): 408–424.
- Dimitrovski, D., & Crespi-Vallbona, M. (2016). Role of food neophilia in food market tourists' motivational construct: The case of La Boqueria in Barcelona, Spain. *Journal of Travel & Tourism Marketing*, no. 34, vol. 4, p. 475–487.
- Fields, K. (2002). Demand for the gastronomy tourism product: Motivational factors. In *Tourism and Gastronomy*. Edited by Hjalager, A. M., and Richards, G. London: Routledge, pp. 36–50.
- Frisvoll, S., Forbord, M., & Blekesaune, A. (2016). An empirical investigation of tourists' consumption of local food in rural tourism. *Scandinavian Journal of Hospitality and Tourism*, no. 16, vol. 1, p. 76–93.
- Goolaup, S., & Mossberg, L. (2017). Exploring the concept of extraordinary related to food tourists' nature-based experience. *Scandinavian Journal of Hospitality and Tourism*, no. 17, p. 27–43.
- Hanks, L., Zhang, L., & McGinley, S. (2016). Unconditioned superstition and sports bar fans. *Journal of Hospitality Marketing & Management*, no. 25, vol. 1, p. 113–131.
- Hsu, F. C., Robinson, R. N. S., & Scott, N. (2018). Traditional food consumption behaviour: The case of Taiwan. *Tourism Recreation Research*, no. 43, vol. 4, p. 456–469.
- Huang, J. (2017). The dining experience of Beijing Roast Duck: A comparative study of the Chinese and English online consumer reviews. *International Journal of Hospitality Management* 66: 117–129.
- Jang, S. S., & Kim, D. (2015). Enhancing ethnic food acceptance and reducing perceived risk: The effects of personality traits, cultural familiarity, and menu framing. *International Journal of Hospitality Management*, no. 47, p. 85–95.
- Ji, M., Wong, I. A., Eves, A., & Scarles, C. (2016). Food-related personality traits and the moderating role of novelty-seeking in food satisfaction and travel outcomes. *Tourism Management*, no. 57, p. 387–396.
- Kim, Y. G., Eves, A., & Scarles, C. (2009). Building a model of local food consumption on trips and holidays: A grounded theory approach. *International Journal of Hospitality Management*, no. 28, vol. 3, p. 423–431.
- Kim, Y. G., Eves, A., & Scarles, C. (2013). Empirical verification of a conceptual model of local food consumption at a tourist destination. *International Journal of Hospitality Management*, no. 33, p. 484–489.
- Kim, Y. G., & Eves, A. (2014). Measurement Equivalence of an Instrument Measuring Motivation to Consume Local Food: A Cross-Cultural Examination Across British and Korean. *Journal of Hospitality & Tourism Research*, no. 40, vol. 5, p. 634–652.
- Kim, A. K. J., & Kim, Y. G. (2017). Understanding ethnic food involvement-based markets and their travel preferences. *Anatolia*, no. 28, vol. 2, p. 182–196.
- Kim, Y. G., Suh, B. W., & Eves, A. (2010). The relationships between food-related personality traits, satisfaction, and loyalty among visitors attending food events and festivals. *International Journal of Hospitality Management*, no. 29, p. 216–226.
- Lee, K.-H., & Scott, N. (2014). Food tourism reviewed using the paradigm funnel approach. *Journal of Culinary Science & Technology*, no. 13, vol. 2, p. 95–115.
- Lin, Y.-C. & Chen, C.-C. (2014). Needs assessment for food and food services and behavioral intention of Chinese group tourists who visited Taiwan. *Asia Pacific Journal of Tourism Research*, no. 19, vol. 1, p. 1–16.
- López-Guzmán, T., Pérez-Gálvez, J. C. & Muñoz-Fernández, G. A. (2019). A quality-of-life perspective of tourists in traditional wine festivals: The case of the wine-tasting festival in Córdoba, Spain. In *Best Practices in Hospitality and Tourism Marketing and Management*, pp. 297–311. Cham: Springer.
- López-Guzmán, T., Torres Naranjo, M., Pérez Gálvez, J. C., & Carvache Franco, W. (2017). Segmentation and motivation of foreign tourists in world heritage sites. A case study, Quito (Ecuador). *Current Issues in Tourism*, p. 1–20.
- López-Guzmán T., Torres Naranjo M., Pérez- Gálvez J.C., & Carvache Franco W. (2018). Gastronomic Perception and Motivation of a Touristic Destination: The City of Quito, Ecuador. *GeoJournal of Tourism and Geosites*, Year XI, no. 1, vol. 21, p.61-73
- Madaleno, A., Eusébio, C., & Varum, C. (2016). International tourism and exports of agro-food products: A causality analysis. *Anatolia*, no. 27, vol. 2, p. 251–261.
- Madaleno, A., Eusébio, C., & Varum, C. (2018). Purchase of local food products during trips by international visitors. *International Journal of Tourism Research*, no. 20, vol. 1, p. 115–125.

- Maeng, H. Y., Jang, H. Y., & Li, J. M. (2016). A critical review of the motivational factors for festival attendance based on meta-analysis. *Journal in Tourism Management Perspective*, no. 17, p. 16-25.
- Mak, A. H. N., Lumbers, M., Eves, A., & Chang, R. C. Y. (2012). Factors influencing tourist food consumption. *International Journal of Hospitality Management*, no. 31, vol. 3, p. 928-936.
- Mak, A. H. N., Lumbers, M., Eves, A., & Chang, R. C. Y. (2013). An application of the repertory grid method and generalised Procrustes analysis to investigate the motivational factors of tourist food consumption. *International Journal of Hospitality Management*, no. 35, p. 327-338.
- Mak, A. H. N., Lumbers, M., Eves, A., & Chang, R. C. Y. (2017). The effects of food-related personality traits on tourist food consumption motivations. *Asia Pacific Journal of Tourism Research*, no. 22, vol. 1, p. 1-20.
- Matlovičová K., Kolesárová J. & Matlovič R. (2014). The use and stimulation of culinary tourism in learning about local and regional cultural peculiarities and historical heritage. In Faracik R., Widawski K. (Eds), 2014. *Enhancing competitiveness of V4 historic cities to develop tourism. Aspects of cultural heritage*. Krakow, Center-Print Kft., p. 141-164.
- Matlovičová K. & Pompura M. (2013). The Culinary Tourism in Slovakia Case Study of the Traditional Local Sheep's Milk Products in the regions of Orava and Liptov. *GeoJournal of Tourism and Geosites*, Year VI, no. 2, vol. 12, p. 129-144.
- Muhammad, R., Ibrahim, M. A., Ahmad, R., & Hanan, F. (2016). Psychological factors on food neophobia among the young culinarian in Malaysia: Novel food preferences. *Procedia - Social and Behavioral Sciences*, no. 222, p. 358-366.
- Mynttinen, S., Logrén, J. Särkkä-Tirkkonen, M., & Rautiainen, T. (2015). Perceptions of food and its locality among Russian tourists in the South Savo region of Finland. *Tourism Management*, no. 48, p. 455-466.
- Oh, M. M., Chan, I. C. C., & Mehraliyev, F. (2018). Ethnic restaurant selection patterns of US tourists in Hong Kong: An application of association rule mining. In Information and Communication Technologies in Tourism, pp. 117-128. Cham: Springer.
- Özdemir, B., & Seyitoğlu, F. (2017). A conceptual study of gastronomical quests of tourists: Authenticity or safety and comfort? *Tourism Management Perspectives*, no. 23, p. 1-7.
- Privitera D., Nedelcu A., Nicula V. (2018). Gastronomic and food tourism as an economic local resource: case studies from Romania and Italy. *GeoJournal of Tourism and Geosites*, Year XXII, no. 1, vol. 21, p. 143-157.
- Poria, Y., Reichel, A., & Cohen, R. (2013). Tourists' perceptions of World Heritage Site and its designation. *Tourism Management*, no. 35, p. 272-274.
- Seo, S., Kim, O. Y., Oh, S., & Yun, N. (2013). Influence of informational and experiential familiarity on image of local foods. *International Journal of Hospitality Management*, no. 34, p. 295-308.
- Seo, S., & Yun, N. (2015). Multi-dimensional scale to measure destination food image: Case of Korean food. *British Food Journal*, no. 117, vol. 12, p. 2914-2929.
- Son, A., & Xu, H. (2013). Religious food as a tourism attraction: The roles of Buddhist temple food in Western tourist experience. *Journal of Heritage Tourism*, no. 8, vol. 2-3, p. 248-258.
- Sthapit, E. (2017). Exploring tourists' memorable food experiences: A study of visitors to Santa's official hometown. *Anatolia*, no. 28, vol. 3, p. 404-421.
- Sthapit, E., Björk, P., & Coudounaris, D. N. (2017). Emotions elicited by local food consumption, memories, place attachment and behavioural intentions. *Anatolia*, no. 28, vol. 3, p. 363-380.
- Tanford, S., & Jung, S. (2017). Festival attributes and perceptions: A meta-analysis of relationships with satisfaction and loyalty. *Tourism Management*, no. 61, p. 209-220.
- Ting, H., Tan, S., & John, A. N. (2017). Consumption intention towards ethnic food: Determinants of dayak food choice by Malaysians. *Journal of Ethnic Foods*, no. 4, vol. 1, p. 21-27.
- Wang, C. Y., & Mattila, A. S. (2015). The impact of servicescape cusion consumer prepurchase authenticity assessment and patronage intentions to ethnic restaurants. *Journal of Hospitality & Tourism Research*, no. 39, vol. 3, p. 346-372.
- Wijaya, S., Morrison, A., Nguyen, T., & King, B. (2016). Exploration of culinary tourism in Indonesia: What do the international visitors expect? Asia Tourism Forum 2016 - The 12th Biennial Conference of Hospitality and Tourism Industry in Asia (ATF-16), 374-379.
- Wu, K., Raab, C., Chang, W., & Krishen, A. (2016). Understanding Chinese tourists' food consumption in the United States. *Journal of Business Research*, no. 69, vol. 10, p. 4706-4713.
- Xu, Y. H., & Zhang, Y. G. (2016). Explaining the consumer behaviors of culinary event attendees: From event motivation to event behavioral intentions. CAUTHE 2016: The Changing Landscape of Tourism and Hospitality: The Impact of Emerging Markets and Emerging Destinations. Sydney: Blue Mountains International Hotel Management School 562-578.
- Youn, H., & Kim, J. (2018). Is unfamiliarity a double-edged sword for ethnic restaurants? *International Journal of Hospitality Management*, no. 68, p. 23-31.
- Yusuf, M. (2017). Measuring tourists' motivations for consuming local Angkringan street food in Yogyakarta, Indonesia. *Journal of Indonesian Tourism and Development Studies*, no. 5, vol. 2, p. 65-72
- *** World Tourism Organization, WTO. (2012). Global report on Food Tourism. Madrid. OMT publicaciones.

Submitted:
25.03.2019

Revised:
30.09.2019

Accepted and published online
03.10.2019

THEORETICAL APPROACHES IN THE RESEARCH OF INBOUND TOURISM: THE CASE OF BULGARIA

Oleksandr KOROL

Yuriy Fedkovych Chernivtsi National University, Faculty of Geography, Department of Geography and Management of Tourism, 2 Kotsyubynskyi Str., 58012 Chernivtsi, Ukraine, e-mail: o.korol@chnu.edu.ua

Tetiana SKUTAR*

Yuriy Fedkovych Chernivtsi National University, Faculty of Geography, Department of Social Geography and Recreational Nature Management, 2 Kotsyubynskyi Str., 58012 Chernivtsi, Ukraine, e-mail: t.skutar@chnu.edu.ua

Citation: Korol, O. & Skutar, T. (2019). THEORETICAL APPROACHES IN THE RESEARCH OF INBOUND TOURISM: THE CASE OF BULGARIA. *GeoJournal of Tourism and Geosites*, 26(3), 887–904. <https://doi.org/10.30892/gtg.26317-405>

Abstract: the present work is aimed at revealing the peculiarities of structure and dynamics of inbound tourism in Bulgaria in 2007-2016. The mathematical statistics and time series method are used to analyze tourism flows. The fluctuations in arrivals to Bulgaria were explained by the dynamics of outbound tourism in the countries of origin of tourists and by other factors. The analysis of the structure of inbound tourism has shown that about half of the arrivals come from the neighbouring countries and these flows have the character of “diffusion”, as shown by the coherence of the arrivals with the length of the common land border, as well as the weak seasonal nature. Other arrivals directed from the countries with unfavourable conditions for recreation at the seaside and are concentrated in the summer period.

Key words: international tourism flows, inbound tourism, structure of tourist arrivals, seasonality in tourism, time series, trend and deviation

* * * * *

INTRODUCTION

One of the main directions of the study of international tourism is the statistical assessment of the number of arrivals to certain countries, complemented by an analysis of their dynamics over a period of time, by consideration of the structure of arrivals by countries of origin of tourists, usually for the last or several marker years, etc. However, significant oppositely directed increments in the number of arrivals from different countries of origin of tourists can offset each other, thus there will be nothing noticeable in the overall dynamics of inbound tourism of the destination country and this will produce the impression that nothing important has happened that year. For example, such an illusion about inbound tourism in Bulgaria was observed in 2009. Therefore,

* Corresponding author

studying dynamics of inbound tourism for a particular country of destination, it is necessary first of all to analyse the flows of visitors by countries of origin for a certain period and only after that the total number of arrivals by the years should be characterized. That is, a methodical approach is proposed, which considers the international tourism flow, first of all, as aggregated one. Unfortunately, it was impossible to apply this approach for all years of research due to the lack of information. In particular, during 2000-2006 the inbound tourism flows to Bulgaria were considered overall, and for 2007-2016 – as aggregated, that is, in terms of the countries of origin of tourists. However, this drawback made it possible to compare these two approaches in one work, which is methodically important.

Theoretical approaches.

International tourism flow is considered as a totality of individual trips that are formed over a period of time from one country of origin and have a common destination country. Usually, for a particular country, not only one, but a plurality of flows that go to it from different countries of origin (for inbound tourism), or, conversely, come from it in the direction of different countries of destination (for outbound tourism) are being researched. Such flows that converge at one end, but diverge at the other end as a "fan" are aggregated tourism flows. Using the concept by N. Leiper, they can be represented schematically as in Figure 1. A grey oval in this scheme is a highlighted object of the study, which is an aggregate inbound tourism flow, estimated in the number of arrivals by separate countries of origin of tourists. With that the quantity of arrivals is being understood as the number of registered visitors of a certain country who are non-residents of this country, per certain period of time (usually, a year). The visitors can be divided into same-day visitors, and tourists (overnight visitors). Measurements are conducted according to the following parameters, as in the scheme (Table 1) (UNWTO data).

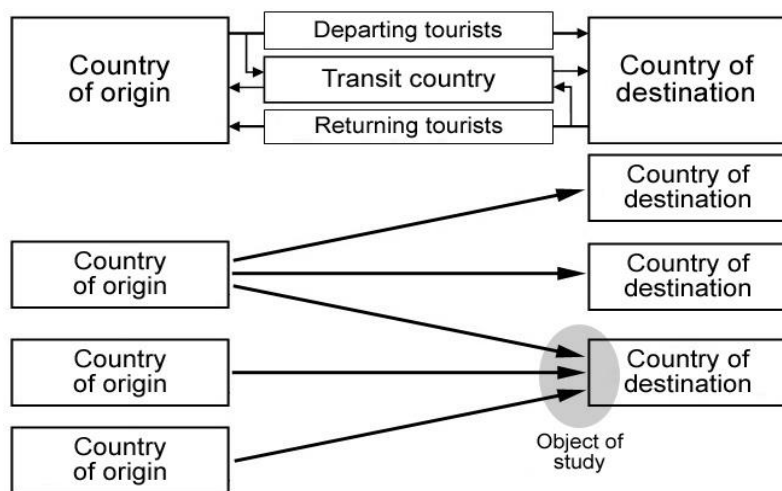


Figure 1. Model of international tourism flow and aggregation of tourism flows (Source: Leiper, 1979)

According to Table 1, all arrival measurements in international tourism are divided into the following categories:

- TF – International tourist arrivals at frontiers (excluding same-day visitors);
- VF – International tourist arrivals at frontiers (including tourists and same-day visitors);
- TCE – International tourist arrivals at collective tourism establishments;
- THS – International tourist arrivals at hotels and similar establishments.

When measuring, preference in international tourism is given to arrivals at frontier. However, it should be borne in mind that not every country has these data at its disposal. Hence, other ways for measuring can be used.

Table 1. Units of measure to quantify the volume of inbound tourism (Source: UNWTO)

Object	Parameter	Place	Comments
Visitors	Arrivals	At frontiers	
Tourists (overnight visitors)	Arrivals	At frontiers	
		At hotels and similar establishments	- excludes tourism in private accommodation
		At collective tourism establishments (e.g. hotels and other)	- arrivals are counted in every new accommodation visited

The present work is aimed at revealing the peculiarities of structure and dynamics, analyse the factors and their influence on the formation of international tourism flows to Bulgaria by using the methodical approach that considers international tourism flow as aggregated. Equally important is the approbation of the proposed methodical approach based on the analysis of the arrival dynamics as time series with trends and deviations from them. Unfortunately, due to the lack of information, the dynamics of inbound tourism in Bulgaria by certain countries of origin was considered only in 2007-2016. Accordingly, the subject of the study can be formulated as time series of the total number of arrivals to Bulgaria and by the countries of origin of tourists, and also the structure of arrivals by these countries.

The characteristics of time series are based on the analysis of two main components of a series – its trend and deviations of the actual values from it as fluctuations of separate levels of the series. In the analytical alignment of the time series, the actual values of y_t are replaced by calculations based on a certain function $Y=f(t)$, which is called the trend equation (t – time variable, Y – theoretical value of the series) (Herasymenko, 2000). The acceptability of the trend equation is determined with the help of the average approximation error, which should not exceed 15%. When studying the time series of international tourist arrivals in Bulgaria by separate countries of origin of tourists, analytical alignment of the series on the basis of the linear function $Y_t=a+bt$ was carried out. According to the regression analysis, the parameters a , b are determined by the least squares method (Herasymenko, 2000).

To simplify their calculations, it is expedient to move the start of the time reference ($t = 0$) to the middle of the time series; then, when numbering the periods from the middle of a series, the half of the numbers will be negative and half positive. In our case, the timing ($t = 0$) for the period 2007-2016 will be between 2011 and 2012, and for the period 2000-2016 – in 2008. Based on the built trend lines, it is possible to find the average annual increment for the entire time series, which is calculated as the ratio of the parameters of the trend equation in percentages $\Delta Y=b/a*100$ (Herasymenko, 2000). The comparison of increments of different time series allows comparing their dynamics. However, this analysis of trend lines is exhausted at that, in particular, they do not allow seeing the influence of certain events that occurred during the period of observations. It is impossible even to correlate the trend values calculated for different time series as the correlation coefficient for them is always equal to 1.

Therefore, the analysis of deviations of the actual indicators from the trend line is of greatest interest. For commensurability of fluctuations of different time series it is expedient to consider not actual absolute deviations, but calculated in the mean-square values (σ). At the same time, it can be assumed that the deviations less than 1σ are random, and larger ones are caused by some factors.

RESULTS

Bulgaria with 8.252 million arrivals kept 20th position in the ranking of the European international tourism destinations in 2016. The number of international tourist arrivals to Bulgaria in 2000-2016 has increased almost threefold from 2.785 to 8.252 million and showed a stable growth, excluding 2007, 2009 and 2015 years (Figure 2).

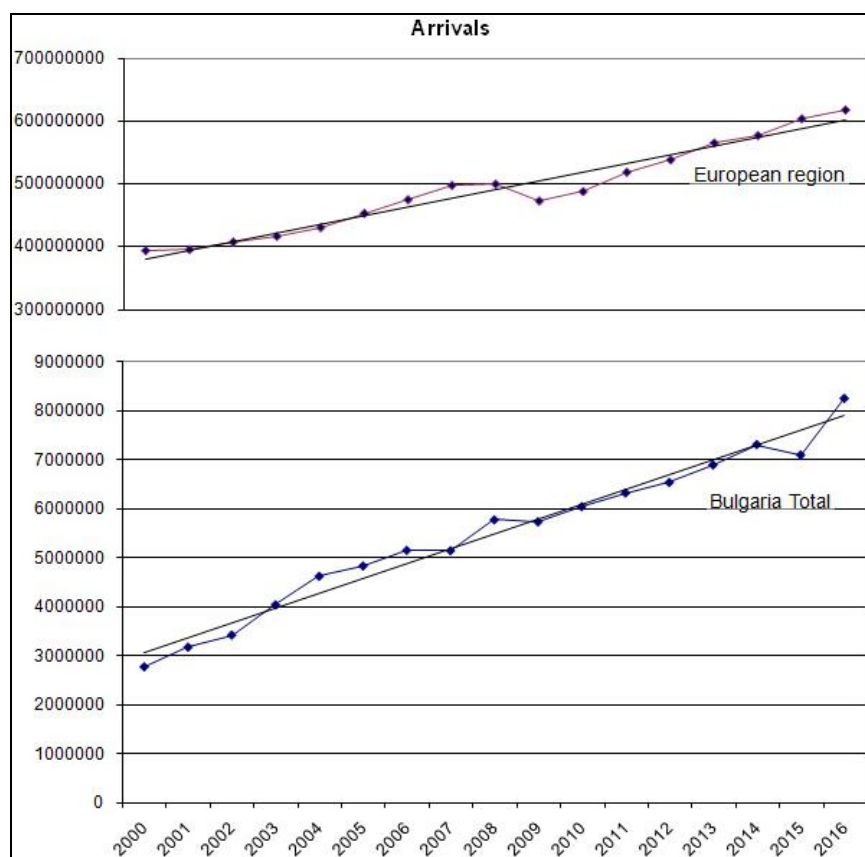


Figure 2. Evolution and trend lines of international tourist arrivals (Source: based on data from UNWTO)

The dynamics of arrivals, both within the European tourism region and in Bulgaria, was linear. The average approximation errors were very small and amounted to only 2.33% and 3.91% respectively. At the same time, inbound tourism in Bulgaria grew almost twice as fast as in Europe since the average annual change of trend series was 5.5%, and for Europe – 2.84% (Figure 2, Table 2). As fluctuations in the dynamics of arrivals show, the development of inbound tourism in Bulgaria was different from that in the European tourism region. This is indicated by the comparison of deviations from trends, the correlation coefficient between them is $r = 0.03$.

In particular, when in Bulgaria for three consecutive years (2004-2006) before accession to the European Union, the number of arrivals was higher than the average by more than 1σ , in Europe nothing similar was observed. The global financial crisis, which in Europe caused the biennium (2009-2010) drop by more than 2σ , did not affect the total number of arrivals in Bulgaria. And only in 2016, their fluctuations, which were larger than one mean square deviation, were consistent (Table 3).

Table 2. Trends for international tourist arrivals, 2000-2016

Destination	Trend equation (own elaboration)	Approximation error, %	Average annual change (ΔY), %
Europe	$Y_t = 491411764 + 13943627 \cdot t$	2.33	2.84
Bulgaria	$Y_t = 5483705 + 301784 \cdot t$	3.91	5.50

Table 3. International tourist arrivals (Source: based on data from UNWTO)

Years	Arrivals within Europe				Arrivals to Bulgaria (TF)			
	Real (mln)	Trend (mln)	Deviation		Real (mln)	Trend (mln)	Deviation	
			(mln)	(σ)			(mln)	(σ)
2000	393.0	379.9	13.13	0.89	2.785	3.069	-0.284	-1.2
2001	395.0	393.8	1.195	0.08	3.186	3.371	-0.185	-0.78
2002	407.0	407.7	-0.749	-0.05	3.433	3.673	-0.240	-1.02
2003	416.0	421.7	-5.693	-0.38	4.048	3.975	0.073	0.31
2004	430.0	435.6	-5.636	-0.38	4.630	4.277	0.353	1.5
2005	453.0	449.6	3.420	0.23	4.837	4.578	0.259	1.1
2006	475.0	463.5	11.47	0.78	5.158	4.880	0.278	1.18
2007	498.0	477.5	20.53	1.39	5.151	5.182	-0.031	-0.13
2008	500.0	491.4	8.589	0.58	5.780	5.484	0.296	1.25
2009	473.0	505.4	-32.35	-2.19	5.739	5.785	-0.046	-0.2
2010	488.0	519.3	-31.29	-2.12	6.047	6.087	-0.040	-0.17
2011	519.0	533.2	-14.24	-0.96	6.328	6.389	-0.061	-0.26
2012	539.0	547.2	-8.185	-0.55	6.541	6.691	-0.150	-0.63
2013	566.0	561.1	4.871	0.33	6.898	6.993	-0.095	-0.4
2014	578.0	575.1	2.927	0.2	7.311	7.294	0.017	0.07
2015	605.0	589.0	15.98	1.08	7.099	7.596	-0.497	-2.11
2016	619.0	603.0	16.04	1.08	8.252	7.898	0.354	1.5

At the beginning of the time series in 2000-2002 in Bulgaria there were significant negative deviations from the trend. In this period, the visa regime with the countries of the former USSR and Eastern Europe was introduced in 2000-2001, and in 2002 the actual number of arrivals in Bulgaria became less than the average by more than one standard deviation. However, after a record increase in inbound tourism in 2003 (+ 18%), during 2004-2008 (with the exception of 2007), the number of arrivals to Bulgaria exceeded the trend values each year by more than 1 σ (Table 3). Thus, in 2003 there was a break through in the dynamics of arrivals to Bulgaria. On the eve of the 21st of November 2002 at the NATO summit in Prague, Bulgaria was invited to an alliance that determined the foreign policy of the country. Many politicians at the summit talked about the gradual reunification of Europe, divided after the Second World War into the Western and Eastern blocs. Besides, as a result of the events of September 11, 2001, the war in Iraq and SARS, overseas travels between tourism regions became less popular and the demand for intraregional travels was growing and given the comparatively rising prices due to the continuous appreciation of the Euro in euro-zone countries (UNWTO Tourism Highlights, 2004), countries in Central and Eastern Europe in general and Bulgaria in particular gained competitive advantages in the European tourism market. Further analysis of the dynamics of arrivals in Bulgaria was conducted for the top countries of origin of tourists. For each of them, time series with their own trends were constructed (Table 4) and deviations from trends were calculated in the mean-square values (σ) (Table 5).

The dynamics of arrivals by the top countries of origin of tourists in 2007-2016 was linear. The linear trend equation cannot be used only for Turkish tourism flows, since the approximation error was more than 20%. Most countries from the top 10 are characterized by an increase in tourism flows, and only the equation for the United Kingdom reflects a

tendency towards reduction in the number of arrivals in Bulgaria. The highest average annual increments in the number of arrivals were observed from North Macedonia, Ukraine and Serbia, the smallest – from Romania, Germany and Greece (Table 4). Fluctuations in the time series of arrivals from a certain country of origin of tourists can be caused, first of all, by the dynamics of outbound tourism in that specific country as a whole. To ascertain this, time series for the total number of departures for the top tourism generating countries for which such information was available were constructed and deviations from trends were calculated in the mean-square values (σ) (Table 6). If the link between the two above-mentioned features is tight, this means that arrivals to Bulgaria from a certain country depend on the dynamics of outbound tourism in it. As a result, it is necessary to shift the analysis to that specific country of origin of tourists.

Table 4. Trends for international tourist arrivals to Bulgaria, 2007–2016

Country of origin of tourists	Trend equation (own elaboration)	Approximation error, %	Average annual change (ΔY), %
Romania	$Y_t = 947100 + 18903 \cdot t$	5.33	2.00
Greece	$Y_t = 927000 + 25600 \cdot t$	2.86	2.76
Germany	$Y_t = 675000 + 16861 \cdot t$	8.47	2.50
Russian Fed.	$Y_t = 465800 + 44024 \cdot t$	14.30	9.45
Turkey*	$Y_t = 325900 + 40576 \cdot t$	21.19	12.45
North Macedonia	$Y_t = 346800 + 38909 \cdot t$	7.53	11.22
Serbia	$Y_t = 254600 + 25733 \cdot t$	9.08	10.11
Poland	$Y_t = 242900 + 15679 \cdot t$	13.86	6.45
United Kingdom	$Y_t = 286500 - 11376 \cdot t$	0.46	-3.97
Ukraine	$Y_t = 198100 + 22164 \cdot t$	0.36	11.19
Bulgaria (total)	$Y_t = 6514600 + 289503 \cdot t$	0.12	4.44

* the trend is unreliable because of the big approximation error

Table 5. International tourist arrivals to Bulgaria and deviation from the trend by country of origin of tourists (Source: based on data from the Ministry of Tourism of the Republic of Bulgaria) *Arrivals

To Bulgaria from:	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
Romania Arr* (mln)	0.750	0.997	0.942	0.918	0.960	0.932	0.941	0.947	0.987	1.097
Deviation (σ)	-1.84	1.90	0.69	-0.01	0.37	-0.40	-0.56	-0.78	-0.43	1.06
Greece Arr (mln)	0.827	0.844	0.815	0.905	0.943	0.929	0.935	1.032	0.973	1.067
Deviation (σ)	0.51	0.22	-1.61	0.55	0.96	-0.36	-1.02	1.37	-1.46	0.83
Germany Arr (mln)	0.520	0.580	0.740	0.714	0.700	0.650	0.683	0.714	0.623	0.826
Deviation (σ)	-1.20	-0.54	1.62	0.97	0.51	-0.51	-0.26	-0.05	-1.68	1.14
Russia Fed. Arr(mln)	0.246	0.291	0.287	0.378	0.455	0.598	0.682	0.656	0.485	0.580
Deviation (σ)	-0.25	-0.24	-0.81	-0.26	0.13	1.29	1.76	0.94	-1.58	-0.98
Turkey Arr (mln)	0.269	0.210	0.193	0.204	0.185	0.294	0.382	0.438	0.519	0.565
Deviation (σ)	1.89	0.39	-0.47	-0.92	-1.81	-0.78	-0.07	0.16	0.77	0.85
N. Macedonia Arr (mln)	0.157	0.217	0.205	0.310	0.383	0.389	0.397	0.408	0.474	0.528
Deviation (σ)	-0.53	0.23	-1.59	0.77	1.99	0.81	-0.29	-1.29	-0.32	0.22
Serbia Arr (mln)	0.163	0.189	0.130	0.206	0.245	0.276	0.303	0.312	0.347	0.375
Deviation (σ)	1.06	1.08	-2.65	-0.44	0.14	0.38	0.43	-0.30	0.10	0.20
Poland Arr (mln)	0.144	0.157	0.269	0.254	0.247	0.242	0.236	0.253	0.261	0.366
Deviation (σ)	-0.78	-0.85	1.79	0.95	0.33	-0.24	-0.83	-0.80	-1.01	1.44
U. Kingdom Arr (mln)	0.354	0.364	0.286	0.289	0.285	0.265	0.258	0.247	0.244	0.273
Deviation (σ)	0.75	1.73	-1.33	-0.67	-0.33	-0.73	-0.53	-0.51	-0.12	1.74
Ukraine Arr (mln)	0.102	0.119	0.111	0.146	0.176	0.254	0.295	0.270	0.242	0.266
Deviation (σ)	0.12	-0.05	-1.00	-0.60	-0.35	1.42	2.02	0.52	-1.07	-1.01
Bulgaria Total										
Deviation (σ)	-0.28	1.27	-0.24	-0.15	-0.19	-0.54	-0.23	0.33	-1.95	1.98

Table 6. International tourist departures and deviation from the trend for country of origin of tourists (Source: own elaboration based on data from the World Bank) *Departures

Total departures	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
Romania Dep* (mln)	10.980	13.072	11.723	10.905	10.936	11.149	11.364	12.299	13.118	16.128
Deviation (σ)	0.16	1.58	0.26	-0.63	-0.85	-0.93	-1.01	-0.51	-0.11	2.03
Greece Dep (mln)	3.519	3.765	3.835	3.799	4.941	4.681	4.594	5.802	6.291	7.235
Deviation (σ)	0.93	0.61	-0.13	-1.12	0.67	-0.84	-1.95	0.00	0.25	1.58
Germany Dep (mln)	82.099	86.201	85.547	85.872	84.692	82.729	87.459	83.008	83.737	90.966
Deviation (σ)	-0.73	0.89	0.48	0.48	-0.16	-1.14	0.75	-1.29	-1.12	1.84
Russia Dep (mln)	34.285	36.538	34.276	39.323	43.726	47.813	54.069	45.889	34.550	31.659
Deviation (σ)	-0.59	-0.32	-0.71	-0.04	0.54	1.08	1.93	0.68	-1.04	-1.52
Turkey Dep (mln)	4.956	4.893	5.561	6.557	6.282	5.803	7.526	7.982	8.751	7.892
Deviation (σ)	0.38	-0.57	-0.06	1.11	-0.26	-2.05	0.58	0.66	1.38	-1.16
Poland Dep (mln)	47.561	50.243	39.270	42.760	43.270	48.290	52.580	35.400	44.300	44.500
Deviation (σ)	0.27	0.90	-1.34	-0.54	-0.36	0.76	1.73	-1.81	0.13	0.24
U. King. Dep (mln)	69.450	69.011	58.614	55.562	56.836	56.538	57.792	60.082	65.720	70.815
Deviation (σ)	1.31	1.23	-0.59	-1.13	-0.91	-0.96	-0.75	-0.35	0.63	1.52
Ukraine Dep (mln)	17.335	15.499	15.334	17.180	19.773	21.433	23.761	22.438	23.142	24.668
Deviation (σ)	1.62	-0.63	-1.59	-0.99	0.20	0.65	1.63	-0.23	-0.51	-0.16

The comparison of deviations for the time series of arrivals to Bulgaria and deviations for the time series of the total number of departures altogether from the top countries of origin in 2007-2016 showed a close link between the two indicated features for the five countries which form 37-41% of incoming tourism flows to Bulgaria, among them: Russian Fed. (correlation coefficient $r = 0.95$), United Kingdom ($r = 0.88$), Ukraine ($r = 0.71$), Romania ($r = 0.61$) and Germany ($r = 0.60$) (Table 7).

Table 7. Correlations between deviations for the time series of arrivals to Bulgaria and total number of departures from the top countries of origin of tourists in 2007-2016

Arrivals to Bulgaria from:	Total departures from:						
	Romania	Greece	Germany	Russian Fed.	Poland	United Kingdom	Ukraine
Romania	0,61						
Greece		0,41					
Germany			0,60				
Russian Fed.				0,95			
Poland					-0,40		
United Kingdom						0,88	
Ukraine							0,71

Hence, arrivals from these countries to Bulgaria depend on the general dynamics of their outbound tourism. Thus, in 2012 and 2013 from Ukraine and Russia, in 2008 and 2016 from the United Kingdom and Romania, as well as from Germany in 2016 significantly more tourists arrived in Bulgaria (deviation of more than 1σ), because in general they travelled abroad more actively then (Table 5, Table 6).

It is important to analyse the causes of fluctuations in the dynamics of outbound flows from the top 10 countries of origin, as this will help to understand better how an aggregated international tourism flow to Bulgaria was formed in 2007-2016.

In 2007, the total number of arrivals to Bulgaria as a whole was at the level of the trend, however, according to the countries of origin, significant negative deviations in the number of arrivals from Romania and Germany were observed (Table 5). In Germany, fiscal tightening took place that year, which influenced private consumption (World

Travel Trends Report, 2006-2007) apparently affecting outbound tourism (-0.73σ) and arrivals of German tourists to Bulgaria (-1.20σ). Regarding outbound flows from Romania, with an almost average number of departures ($+0.16 \sigma$) Romanian tourists arrived in Bulgaria much less comparing with the trend value (-1.84σ), that is, the difference between the indicated characteristics was 2σ . This means that there was a significant redirection of tourism flows. Obviously, after joining the European Union in 2007, Romanian tourists benefited from a visa-free regime and favoured European countries. This was facilitated by the exchange rate of the Romanian Lei, which was the highest to Euro (RON 3.2 to Euro) that year. In the next year, 2008, against the background of a noticeable increase in the total number of departures from Romania ($+1.58 \sigma$), arrivals in neighbouring Bulgaria also increased ($+1.90 \sigma$). After the global financial crisis in 2009, when the Lei fell to 4.2 to Euro, there were mostly minor (less than 1σ) negative deviations in the arrivals of Romanian tourists to Bulgaria.

In general, 2008 was one of the most successful for inbound tourism in Bulgaria, when one of the largest positive deviations in the total amount of arrivals ($+1.27 \sigma$) during the period 2007-2016 was recorded. This was the year after joining the European Union and before the financial crisis of 2009, before the adverse factors that could affect outbound flows in main tourism-generating countries, as it will be discussed further, showed themselves. In particular, this applies to Britain, for which in 2008 there were positive deviations for more than 1σ both for departures in general and for arrivals in Bulgaria. Other source markets, which showed a significant growth in arrivals in 2007-2008 were Serbia and Turkey. Although we are not able to conduct a similar analysis comparing fluctuations in the dynamics of arrivals and departures for these countries, we assume that the increased tourist interest of their citizens was related to the accession of Bulgaria to the EU. At first glance, the global financial crisis did not affect tourism volumes in Bulgaria overall – a negative deviation from the trend was only -0.24σ in 2009, whereas for the European tourism region it exceeded 2σ . However, regarding the countries of origin of tourists, the situation was the opposite, and almost zero overall outcome was the result of oppositely directed deviations that offset each other.

In particular, against the background of the global financial crisis, arrivals from Greece, Northern Macedonia, Serbia and the United Kingdom reduced by more than 1σ . Instead, the deviations from the trend for inbound flows to Bulgaria from Germany and Poland in 2009 were positive and significantly exceeded the trend values ($+1.62 \sigma$ and $+1.79 \sigma$ respectively). Along with that, there was a significant negative deviation (-1.34σ) in the total number of departures from Poland.

That is, there was a paradoxical situation, when in 2009 against the background of a significant decrease in the total number of departures from Poland, an increase in arrivals of the Poles in Bulgaria was observed. The only explanation is redirection of tourism flows. Obviously, in the context of the financial crisis, Poles and Germans did not refuse from taking a rest, but rather reoriented themselves on cheaper destinations, in particular Bulgaria, which attractive resorts offered relatively inexpensive leisure with a good price-quality ratio. By the way, the characters of the dynamics of tourism flows to Bulgaria from Poland and Germany are very similar, as indicated by a comparison of their deviations from trends, the correlation coefficient $r = 0.91$. Even greater consistency was noticed between the deviations in arrivals from Ukraine and Russia ($r = 0.95$), which allows us to consider these countries together.

Improvement of the economic situation along with increasing affluence after the financial crisis of 2009 as well as the stabilization of exchange rates reflected themselves in significant exceeding of the trend values of tourist departures from Ukraine and Russia and arrivals in Bulgaria in 2012-2013. Besides, in 2012, there was a simplification in visa

formalities for visitors from these two countries. After the annexation of the Crimea by Russia and its bringing about the war in the Donbass region of Ukraine in 2014, the dynamics of outbound tourism flows from Ukraine and Russia deteriorated significantly, as a result, the arrivals to Bulgaria decreased by about 10 and more in 2015-2016. Although these two countries are opponents in these events, they both lost economically, which considerably reduced the purchasing ability of their population. In particular, from July 2013 to July 2015, the Ukrainian Hryvnia depreciated to the Euro by 127% and the Russian Ruble by 44%. Negative deviations in the dynamics of arrivals in Bulgaria in 2015 were also observed from other countries, in particular from the Eurozone (Germany and Greece), as well as from Poland. The depreciation of the Euro, when from July 2014 to July 2015, the Euro's value moved down to the US dollar by 18%, influenced the decline in tourism demand for international travel in general and, in particular, for one of the leaders of outbound tourism – Germany. Thus, in 2015, the total amount of departures of German tourists decreased by more than one standard deviation and their arrivals in Bulgaria became less than the trend value by 1.68 σ .

This year was generally one of the worst for inbound tourism in Bulgaria (-1.95 σ). In addition to the above-mentioned events, this could have been boosted by the escalation of the war in Syria that provoked a refugee crisis in Europe, by a series of terrorist attacks (France, Tunisia, Turkey, Iraq, etc.) which had an Islamic footprint. Thereby, tourists from Europe were not inclined to travel, especially in this direction.

To confirm this, we note that the arrivals in neighbouring Turkey in 2015 compared to the previous year decreased by 1%, while in 2013 and 2014, the annual increase exceeded +5%. The analysis of the tourist activity of the Greeks shows that the deviations from the trend values of the total number of departures and their arrivals to Bulgaria are consistent with the significant changes in the economic and political situation in Greece, although these two features are not always well correlated with each other. In those years, Greece underwent significant economic upheavals, so more attention should be paid to how they influenced the total number of departures, as well as the arrivals to its neighbour – Bulgaria. As the economic indicator, which directly determines the international tourism expenditure, and hence the departures, household consumption expenditure per capita (constant 2010 US\$) were used.

In particular, they had the following values for Greece (Figure 3).

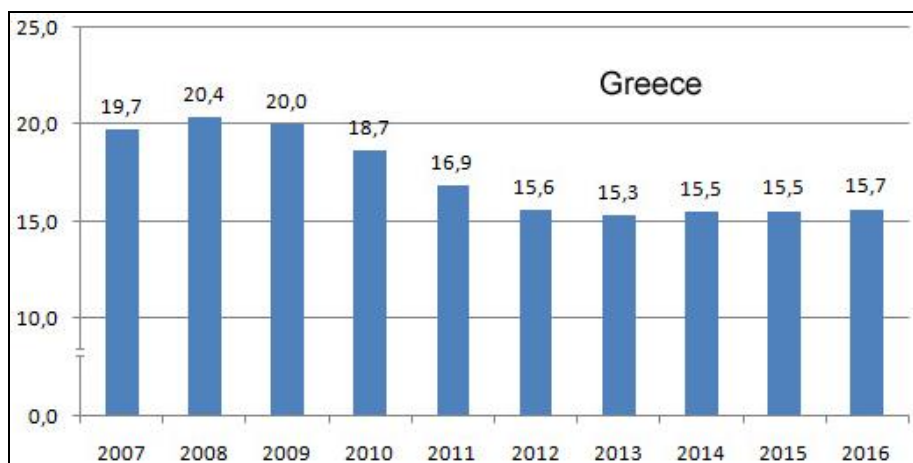


Figure 3. Household consumption expenditure per capita (constant 2010 US\$) (Source: the World Bank data)

In 2009, in the midst of the global financial crisis, along with the fall in the purchasing ability of the Greeks there was decrease only in their arrivals to Bulgaria (-1.61σ), and in the next 2010, with the beginning of the debt crisis, the total amount of departures also dropped (-1.12σ). Since then, the steady decline in the specific consumption expenditure of Greek households had been observed until 2013, when they reached their minimum (see Figure 3). It was then that considerable negative deviations were recorded both for arrivals in Bulgaria (-1.02σ), and for the total number of departures from Greece (-1.95σ). After that, with the improvement of the economic situation, there has been a three-year tendency of increasing the last indicator.

Also in 2014, there was a significant positive deviation in the number of arrivals to Bulgaria (1.37σ). However, in the next, 2015, year, against the background of a depreciation of the Euro and, above all, in connection with the extensive economic damage after a financial referendum in Greece, when, in the summer, during the two weeks surrounding the vote, banks closed and restricted ATM withdrawals to 60 Euros per day, the number of the Greeks' arrivals to Bulgaria was less than the trend value by one and a half standard deviations. Regarding tourism flows from Poland, against the background of total departures close to the trend value, there was a notable negative deviation in arrivals to Bulgaria in 2015 (-1.01σ) and positive in 2016 ($+1.44\sigma$), that is we see again the redirection of flows. This is probably due to the fluctuations of the Polish Zloty to the Euro and the aftermath of security incidents in some popular tourism destinations. Strengthening of the Polish Zloty in 2015 has contributed to the increasing interest in more expensive destinations – Greece and Croatia (as evidenced by the analysis of outbound tourism in Poland in 2015), but already in the next 2016 we observe the opposite situation – the depreciation of Polish Zloty against the Euro, lower prices in the resorts of Bulgaria, which is furthermore considered as an ideal destination for price-conscious customers, as well as a considerable reduction in flows to Turkey and Egypt in 2016. As a result, there was growth in arrivals in Bulgaria. Obviously, exchange rate variations in Poland and security problems in other destinations, in particular in Turkey, were important factors influencing tourism flows from Poland to Bulgaria in 2015 and 2016.

After unsuccessful for inbound tourism, 2015, year, Bulgaria enjoyed strong results in arrivals (deviation $+1.98\sigma$) in 2016. This positive deviation was due, above all, to greater than average value of arrivals from Romania ($+1.06\sigma$), Germany ($+1.14\sigma$), Poland ($+1.44\sigma$) and Great Britain ($+1.74\sigma$). The reactivation of incoming flows from these countries, except Poland, is explained by the same substantial excess in the total number of departures. That is, it was due to stronger travel demand from major generating markets overall, mostly due to fall in resort prices around Europe (incl. Bulgaria), and enhancement of Bulgaria's competitive advantage in the European tourism market. When choosing a destination, tourists began to pay more attention to security issues and Bulgaria was the place that they perceived as safe. Therefore, in the summer of 2016, when failed coup occurred in Turkey, tourism flows in this direction could partly be redirected to neighbouring Bulgaria. By the way, the top five tourism source markets for Turkey include Germany and the United Kingdom.

Structure of International Tourist Arrivals in Bulgaria

When considering the structure of inbound tourism, it should be borne in mind that over the study period (2000–2016), the number of arrivals in Bulgaria has increased threefold. In such circumstances, the maintenance of the share of arrivals on the same level is possible only when the tourism flows from a certain country of origin will grow at the same rate. In other words, the reduction of this share does not necessarily indicate a decrease in the number of arrivals from one country or another. We consider the structure of inbound tourism in Bulgaria for three years: 2000, 2008, 2016 (Table 8).

At first, we pay attention to arrivals from neighbouring countries. This approach is determined by the fact that the neighbouring flows have their own characteristics that distinguish them from the rest of tourism flows. Travels to neighbours, as a rule, are carried out at short distances, do not last long and are mainly “do-it-yourself” trips. A little money is spent for such trips and weekly free time (weekends) is suitable for them.

Thus, insignificant consumer spending and the opportunity to travel weekly make tourism flows to neighbours widespread. However, such trips are inexpensive; therefore, a large share of tourists from neighbouring countries predetermines low profitability of inbound tourism, which is calculated as international tourism receipts per arrival (Korol & Skutar, 2018). A country of destination with such a structure of inbound tourism is not considered too attractive, because it is visited, first of all, due to availability of money and time, and not for the sake of tourist attractions.

Table 8. Structure of international tourist arrivals in Bulgaria
(Source: based on data from the Ministry of Tourism of the Republic of Bulgaria)

№	Countries of origin of tourists	2000		2008		2016	
		arrivals (1000)	share (%)	arrivals (1000)	share (%)	arrivals (1000)	share (%)
1	Romania	221	7,9	997	17,2	1097	13,3
2	Greece	363	13,0	844	14,6	1067	12,9
3	Germany	283	10,2	580	10,0	826	10,0
4	Russian Federation	133	4,8	291	5,0	580	7,0
5	Turkey	177	6,4	210	3,6	565	6,8
6	North Macedonia	674	24,2	217	3,8	528	6,4
7	Serbia*	260	9,3	189	3,3	375	4,5
8	Poland	25	0,9	157	2,7	366	4,4
9	United Kingdom	62	2,2	364	6,3	273	3,3
10	Ukraine	92	3,3	119	2,1	266	3,2
11	Other	495	17,8	1812	31,3	2309	28,0

* Incl. Serbia and Montenegro up to 2006.

In 2016, 44% of international tourists arrived in Bulgaria from 5 neighbouring countries: Romania (13.3%), Greece (12.9%), Turkey (6.8%), North Macedonia (6.4%) and Serbia (4.5%). In 2000, these countries accounted for more than 60% of arrivals, and a noticeable decrease in their share was observed already in 2007 – 42.1%, when Bulgaria joined the European Union. Since then, the share of arrivals to Bulgaria from neighbouring countries hasn't changed much. Travels to neighbouring countries often cover areas nearby the state border and have the character of “diffusion with the return” (Figure 4).

Tourist flows to neighbors may come within the Hagerstrand's statistical theory of movements, according to which those inhabitants of home country who live closer to state border would have more often visits to border regions of neighboring country (Hagerstrand, 1970). As known, diffusion leads to a levelling of density on both sides of a transparent border and its speed depends upon the difference in density in both sides and the contact area of interpenetration, which in the case of tourism to neighbouring countries is identified by the length of the common border. But every tourist returns home, so the density does not level out on both sides and diffusion in this case is called "with the return". Nevertheless, there will always be some number of tourists on territory of the destination that can be explained by the density of residents nearer to the border in the country of origin, by the length and transparency of the common land border. Let's assume that the population in neighbouring tourism-generating countries is more or less evenly spaced throughout the territory, especially near the common land border with the

country of destination. At the same time, people make chaotic trips without giving preference to any direction. If the borders have the same transparency, then the number of such arrivals to the destination must obviously be consistent with the length of the common land border. In the structure of international tourism, the neighbouring countries that share a land border, can account for up to 90% of arrivals, and on average their share reaches 50%. At the same time, the number of neighbouring countries does not play a significant role; the more important here is the existence of a long land border.

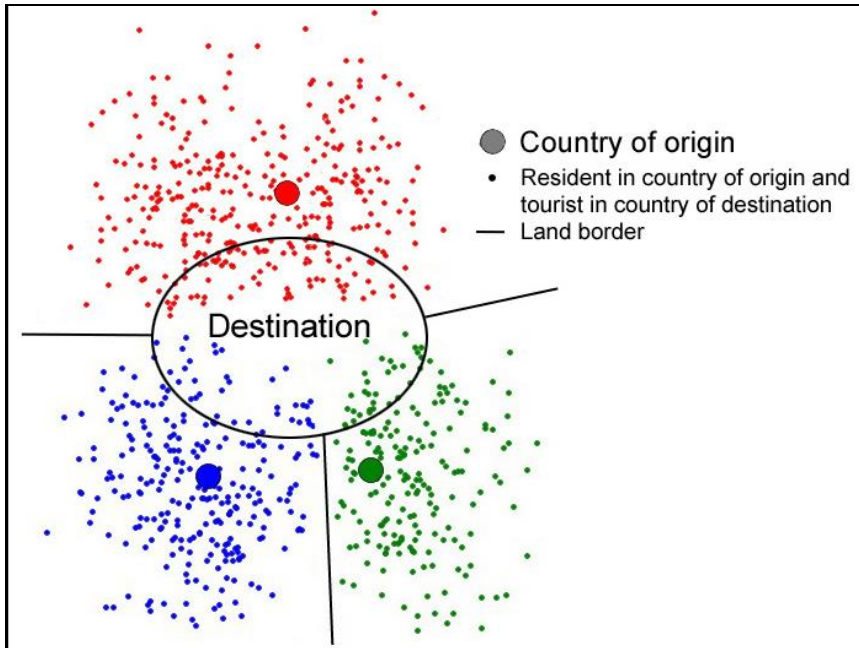


Figure 4. “Diffusion” in tourism to the neighbouring country

Previously, in our study of tourist flows of 28 countries, mostly the EU (Korol, 2017), we observed that the fraction of the neighbouring country in the structure of tourist arrivals was often proportional to the share of the common land border with the country of destination. We assume that under otherwise equal conditions, the volumes of tourists’ exchange between such countries are congruent with the length of common land border. To test this assumption for neighbouring inbound tourism flows to Bulgaria, the chi-square criterion (χ^2) was used, which is also called in mathematical statistics the criterion of independence, consistency and homogeneity. It is defined as (Horkavyi & Yarova, 2004):

$$\chi^2 = \sum \frac{(O - E)^2}{E}$$

Where:

O – the observed fraction of arrivals from the country of origin, which has common land border with destination, in the total number of arrivals from neighbours, which is taken as 100%;

E – the expected fraction of arrivals from a neighbouring country of origin, which in theory is equal to the share of a common land border, the total length of which is 100% (Horkavyi and Yarova, 2004).

The deviation between the observed and the expected fractions may be significant if caused by some factor, and also insignificant, which is due to random causes, and then the consistency of the fractions is confirmed. To determine this, the calculated chi-square value is compared to the table's values for a given degrees of freedom. If the total value of χ^2 is more than the one in the table, then the discrepancy is not random, i.e. the consistency of fractions is not confirmed (Horkavý & Yarova, 2004). Thus, as a result of the performed analysis, the coherence between the share of arrivals from neighbours with the share of the common land border was observed in Bulgaria (Table 9).

Table 9. Coherence between the share of arrivals to Bulgaria from neighbouring countries with the share of the common land border, χ^2 (Source: based on data from the Ministry of Tourism of the Republic of Bulgaria)

№	Neighbouring countries	The length of the land border		Arrivals from neighbours (%), average for 2007–2016	χ^2
		km	share (%)		
1	Greece	494	27.3	33.1	1.232
2	North Macedonia	148	8.2	12.4	2.151
3	Romania	608	33.6	33.8	0.001
4	Serbia	318	17.6	9.1	4.105
5	Turkey	240	13.3	11.6	0.217
	Total	1808	100	100	7.706

The population density of the tourism-generating countries in the territories near the border with Bulgaria is more or less equal. The only exception is Romania where it is considerably higher. However, the share of arrivals from this country is also consistent with the share of common land border. This is explained by the fact that the Danube River, on the border with Bulgaria, becomes a hindrance to more intensive tourism flows from densely populated Romanian territories, including Bucharest agglomeration.

Although in the case of Bulgaria, the assumption of the coherence of tourism flows from neighbours with the length of the common land border was confirmed, as shown by similar studies for other countries (Korol, 2017), such a regularity is not always observed. However, this does not disprove the theoretical position, because it is based on the homogeneity of geographical and demographic conditions, which does not occur everywhere, but is often distorted by the following circumstances:

- unequal population density on the territories close to the common border, primarily from the country of origin of tourists;
- mental affinity of the population of countries on different sides of the border;
- transparency of the common border, which is hampered by rivers and other linear geographic barriers, visa regime, etc.

Combination of these circumstances may weaken or enhance their mutual influence. For example, if geographical obstacle is of plane character, then it does not only complicate transport accessibility, but also determines the low population density, as it is observed in mountainous regions. Consequently, these geographic and demographic circumstances can be introduced as additional parameters of the model of the formation and distribution of tourism flows from neighbours. So far, the tourism flows from the neighbours have been considered in view of the fact that they have the “diffusive” character, i.e. distributed randomly without any advantage in direction. In other words, diffusion trips do not have a vector, and this is possible when the countries of origin of tourists and destinations differ little from each other, primarily by tourist and recreational resources. If we imagine that the country of origin of tourists has an intracontinental location, and in the south, in the neighbourhood there is a destination with a warm sea, it is obvious that under such conditions travel will have the direction, that is, a vector. It can

be said about the arrivals from neighbours that they can have both a diffusive and a vector character, whereas the distant travels are usually directed to certain destinations, where the motives of inversion behaviour in tourism, developed by N. Graburn (Graburn, 1983) can be best satisfied. That is, for long-distance trips, a typical vector is an escape to a temporary opposite, which includes from a geographic point of view moving to destinations with the environment, which differs from the usual environment.

Thus, it is time to consider the rest of the countries, not neighbours, in the structure of arrivals in Bulgaria. It is anticipated that these trips will be of a vector nature, that is, they will be from countries that do not have what is found in this destination (Bulgaria). There is a moderate type of climate in Bulgaria that causes an intense manifestation of seasonality in tourism. Seasonality is “a temporal imbalance in the phenomenon of tourism, [which] may be expressed in terms of dimensions of such elements as numbers of visitors, expenditure of visitors, traffic on highways and other forms of transportation, employment, and admissions to attractions” (Butler, 1994).

Revealing the seasonality will help to identify vector travels that will concentrate in one or another season, and diffusion trips, on the contrary, will be distributed more evenly throughout the year. Thus, the task arises to determine the seasonality of arrivals and their distribution by season for each country of origin of tourists. Due to the lack of data, this was done for Bulgaria only in 2013, which turned out to be one of the quieter years for international tourism statistics (Table 10). Analysing the seasonality of tourism, it is necessary to find its quantitative characteristics (Krachylo, 1980):

$$S = \frac{100 \sum |x - \bar{x}|}{\sum x}$$

Where:

S – rate of seasonality;

x – number of tourists in a certain month;

\bar{x} – average monthly number of tourists throughout a year.

The numerator here is the sum of deviations of the levels of time series variables from the average level of variable taken with a plus sign, and the denominator is the number of tourists for the entire cycle (Krachylo, 1980).

Table 10. The structure of tourist arrivals to Bulgaria by seasons and the seasonality
(Source: own elaboration based on data from the Ministry of Tourism of the Republic of Bulgaria)

Arrivals to Bulgaria from:	Arrivals by Seasons, %				Rate of Seasonality
	winter	spring	summer	autumn	
Romania	12.1	22.6	39.4	25.9	40.7
Greece	17.9	20.7	38.4	23.0	31.5
Turkey	20.9	23.1	28.9	27.2	13.5
North Macedonia	26.0	23.0	26.2	24.8	12.6
Serbia	22.2	23.1	30.4	24.3	11.4
Germany	3.7	7.2	66.2	22.9	101.9
Russian Federation	6.7	10.0	70.9	12.4	93.1
Poland	4.5	6.5	65.9	23.0	102.5
United Kingdom	12.4	12.2	55.0	20.4	69.5
Ukraine	7.4	7.7	70.1	14.7	93.5

As expected, the seasonality of arrivals to Bulgaria from neighbours was much smaller than from the rest of the top countries of origin of tourists (Table 10). Strongly

pronounced diffusive character, which is evidenced by an almost equal distribution of arrivals throughout the year, was peculiar to trips from Serbia, North Macedonia and Turkey. Arrivals from Greece and Romania had a small vector component, since about 40% of them were in the summer season. Although these two countries also have access to warm seas, in Romania, international sea resorts did not evolve in times of N. Ceausescu, as opposed to Bulgaria, where recreation at sea was popular as far back as in times of "socialism". Since then Bulgaria has established a status of being the best Black Sea destination. As S. Ivanov notes, while Bulgaria promotes a variety of tourism products, for example, cultural tourism (including the Thracian heritage) and golf, adventure, eco-, rural, events, and wine tourism, its main tourist product is mass tourism, with the attraction of the sun in the summer and snow in winter (Ivanov, 2017).

Significantly larger than an average annual share of Greek tourists in the summer can be explained by the multilevel international tourist exchange, when, due to the difference in the cost of rest at home and abroad, tourists from the countries with a high standard of living travel to destinations with a lower standard of living and, accordingly, the cost of rest. The seasonality of arrivals to Bulgaria from the top countries, which are not neighbours, was much higher; its indices were 90-100. These trips were mostly of a vector character – carried out for recreation at sea, since about 2/3 arrived in the summer (Table 10). In 2016, the total share of these countries in inbound tourism in Bulgaria was 28%, including Germany (10%), Russia (7%), Poland (4.4%), United Kingdom (3.3%) and Ukraine (3.2%). In 2000, these countries accounted for more than 21% of arrivals.

In 2008, their share increased to 26%, primarily owing to Poland and the United Kingdom (Table 8). When considering the dynamics of arrivals to Bulgaria by certain countries of origin of tourists, a high correlation between the deviations from the trends, calculated in the mean-square values (σ), $r = 0.91$ for Germany and Poland, as well as $r = 0.95$ for Ukraine and Russia was observed. Their indexes of seasonality also turned out to be almost identical (Table 10). This indicates the similarity of the studied tourism flows in each pair of these countries that allows grouping them. Tourist arrivals to Bulgaria from Germany and Poland were characterized by the highest indexes of seasonality. This is quite expected, because both of them are washed only by the cold waters of the Baltic and North Seas, which does not contribute to swimming and beach recreation within the country. For both the Poles and the eastern Germans, Bulgaria is a traditional maritime destination even from the "socialist" times. The important place of Germany in the structure of arrivals, the share of which did not fall below 10% for three marker years, is due to the fact that it is the world leader in the international (outbound) tourism market, which is promoted not only by the economic strength of the country, but also by geographical conditions. Although such Mediterranean countries as Spain, Italy and France remain the most popular among German tourists, the tourism flows to Spain and France have been decreasing over the last few years because of frugality; instead, more Germans travel to Turkey. Obviously, for the same reason, they choose Bulgaria.

It is also proved by the fact, that there is the most positive deviation from the trend (1.62σ) observed in the time series of arrivals of German tourists to Bulgaria in the midst of the global financial crisis in 2009. The desire to save on recreation manifested itself even more brightly in arrivals from Poland. In 2009, the total number of tourist departures from this country was less than the trend value by more than one standard deviation, instead, there were by 1.79σ more Poles who arrived in Bulgaria that year.

By the way, due to more than the average number of arrivals from these two countries against the background of more than 10 drop in arrivals from other countries in 2009, the total number of arrivals in Bulgaria remained at almost the level of the trend (Table 5). Russia and Ukraine, unlike the two previous countries of origin of

tourists, have access to the Black Sea. However, because of the northern position of Russia, there is very little coastline with comfortable conditions for swimming and beach recreation, and its own Black Sea beaches are clearly not enough for this.

Therefore, Russians like to take a rest abroad in the summer. Many Russian tourists go to Bulgaria, because the Russian language is understood there, and for the same reason Ukrainians go there too. In general, Russian-speaking tourists do not even suppose that they will not be understood in Bulgaria, starting from service workers in hotels and restaurants, to sellers and ordinary passers-by. Thus, many tourists, first of all from Ukraine, find accommodation and eat independently in Bulgaria in a large private sector and hotels, since it is easy to navigate in the place, to communicate with the hosts and come to agreement about a price which is low due to the high competition.

The relative cheapness of the vacation, which is formed on the background of low specific consumption expenditure of the local population, is the second reason for visiting Bulgaria. For the same money, the tourism service at the Black Sea resorts in Russia and Ukraine is usually worse. Therefore, tourists often prefer the resorts of Bulgaria to their own Black Sea coast. Obviously, the main incentive for tourists from Russia was linguistic affinity, for Ukrainians there was also geographical proximity, as well as a better price-quality ratio compared to domestic tourism.

CONCLUSIONS

During 2000-2016 the dynamics of inbound tourism as a whole showed a stable growth (excluding 2007, 2009 and 2015 years) and the number of international tourist arrivals in Bulgaria has increased almost threefold from 2.785 million in 2000 to 8.252 million in 2016. Bulgaria's accession to NATO at the end of 2002, which determined its foreign policy and consolidated economic growth, as well as the country's joining the EU in 2007, had a significant impact on inbound tourism in Bulgaria. On one hand, interest in Bulgaria as a new member of the EU increased, on the other hand, complication of visa formalities for non-EU countries restricted the inbound tourism flows at the beginning of the study period that affected the structure of arrivals and the share of neighbouring countries reduced from more than 60% in 2000 to 42% in 2007. The next year after joining the EU, the year 2008, was one of the best in terms of the positive dynamics of arrivals to Bulgaria, and 2016 turned out to be the same.

The worst was 2015, when after the annexation of the Crimea and the aggression of Russia in Eastern Ukraine, due to a noticeable depreciation of their national currencies, the arrivals from these two countries significantly decreased. There were also fewer tourists from Germany and Greece in Bulgaria that year, which could be caused by the Euro depreciation in 2015. Although the Bulgarian Lev was pegged to the Euro, the substantial depreciation of the last could affect consumer mood in the Eurozone countries, where tourists came from. Research of the dynamics of arrivals based on the analysis of time series by the top countries of origin of tourists for 2007-2016 allowed to identify the main factors and the nature of their impact on tourism flows from these countries and, as a result, to explain the formation of the total inbound flow to Bulgaria. As shown by the correlation analysis, fluctuations in arrivals from 5 countries (Russia, United Kingdom, Ukraine, Romania and Germany), which form a substantial part (37-41%) of incoming tourism flows to Bulgaria, are related to changes in the general dynamics of their outbound tourism. At the same time, deviations from the trends of outbound flows at specific periods of time (years) are caused by the impact of both domestic for tourism generating countries and external factors of regional or global dimension. The most influential were economic (level of private consumption, exchange rate) and security factors. It should be noted that the same events, in

particular economic ones, have had a different impact on the inbound tourism flows to Bulgaria. For example, the global financial crisis in 2009 caused a marked reduction in tourism flows from countries such as Greece, United Kingdom, Serbia and North Macedonia, on the contrary, the arrivals from Germany and Poland increased then.

As a result, the total number of arrivals in Bulgaria has not undergone notable changes, and this has led to the false impression that the global financial crisis didn't have any influence there. On the contrary, consideration of international tourism flow as aggregated one from separate flows by separate countries of origin of tourists highlights the real situation. The case of foreign tourists from Germany and Poland, who reoriented themselves towards Bulgaria in times of economic difficulties, describes it as an attractive destination where it is possible to save money.

In 2016 less than half (44%) of international tourists arrived in Bulgaria from 5 neighbours: Romania, Greece, Turkey, North Macedonia and Serbia. Although the number of tourists from these countries increased over the study period, their share in the structure of arrivals decreased by almost a third, mainly due to Northern Macedonia and Serbia. This is quite positive, since such travels are mainly "do-it-yourself" trips, short-term and inexpensive. Thus, a large share of tourists from neighbouring countries determines the low profitability of inbound tourism, and the destination with such a structure of inbound tourism is not considered to be too attractive.

Trips from neighbouring countries may have the character of diffusion, which will be manifested in the coherence between the share of arrivals with the length of the common land border. Although such regularity is not always noticeable, as it is violated by the heterogeneity of geographical and demographic conditions in the territories near the border, and it took place in the case of Bulgaria. Mainly "diffusive" character of travels from neighbours is also shown by the weak seasonality, despite the fact that seasons are very obvious in Bulgaria. The seasonality of arrivals to Bulgaria from the rest of the top countries was much higher and the trips were mainly carried out for recreation at sea, since about 2/3 of the arrivals took place in summer. Germany and Poland were among them, as are washed only by the cold waters of the Baltic and North Seas, and it does not contribute to swimming and beach recreation within the country.

The trips from these countries were highly consistent with each other, and together they made up almost 15% of total arrivals in 2016. Flows from Ukraine and Russia were also very similar and accounted for more than 10% in the structure of inbound tourism in Bulgaria. The main incentive for tourists from Russia was linguistic affinity, for Ukrainians there was also geographical proximity, as well as a better price-quality ratio compared with domestic tourism on their Black Sea coast. Thus, taking into account the peculiarities of the dynamics of inbound tourism flows by countries of origin of tourists, including by season, as well as the structure and geography of arrivals, we can characterize the international specialization of Bulgaria in inbound tourism as an attractive destination for swimming and beach recreation, where tourists can save.

REFERENCES

- Butler R. W. (1994). Seasonality in Tourism: Issues and Problems. In A. V. Seaton (ed.) *Tourism: the State of the Art*. Chichester: Wiley & Sons.
- Goeldner, Charles R. (2009). *Tourism: Principles, Practices, Philosophies* / Charles R. Goeldner, J. R. Brent Ritchie.—Eleventh ed. Hoboken, New Jersey: John Wiley & Sons, Inc.
- Graburn, N. (1983). The Anthropology of Tourism. *Annals of Tourism Research*, vol.10 no.1
- Hagerstrand, T. (1970). *What about people in regional science?* Lund: Springer – Verlag.

- Horkavi, V.K., & Yarova, V.V. (2004). *Matematychna statystyka [Mathematical Statistics]*. Kyiv: VD "Profesional" [in Ukrainian].
- Ivanov, S. (2017) Mass tourism in Bulgaria: The Force awakens. In David Harrison and Richard Sharpley (Eds). *Mass tourism in a small world*. Wallingford: CABI, pp. 168-180.
- Korol, O. (2017). Vplyv protyazhnosti heohrafichnoho prostoru na rozpodil mizhnarodnykh turystychnykh potokiv [Impact of the of geographical space's length on the distribution of international tourist flows]. *Human Geography Journal*, 23 (2), pp. 98-107 [in Ukrainian].
- Korol, O., & Skutar, T. (2018). Comparative Analysis of International (Inbound) Tourism Development within Ukraine and Poland, *Prace Komisji Geografii Przemysłu Polskiego Towarzystwa Geograficznego [Studies of the Industrial Geography Commission of the Polish Geographical Society]*, 32(2), pp. 338–355. <https://doi.org/10.24917/20801653.322.24>.
- Krachylo, M. (1980). *Osnovy turyzmovedenya [Basics of Tourism Studies]*. Kyiv: Higher school [in Russian].
- Leiper, N. (1979), The framework of tourism: towards a definition of tourism, tourist, and the tourist Industry. *Annals of Tourism Research*, vol.6 no.4, pp. 390-407.
- Teofilov, M. (2017) Investing in Bulgarian Tourism [Electronic resource]. Access mode: https://docs.google.com/viewerng/viewer?url=http://www.tourism.government.bg/sites/tourism.government.bg/files/investin_g_bgtourism_final.pdf – Appeal date 12.04.2019.
- *** Applied time series econometrics. Edited by Lütkepohl, H., Krätzig, M. (2004). New York: Cambridge University Press, pp. 8-40.
- *** Charakterystyka krajowych i zagranicznych podróży mieszkańców Polski w 2015 roku [Characteristics of domestic and foreign travels of Polish residents in 2015]. [Electronic resource]. Access mode: <https://www.pot.gov.pl/pl/archiwum/charakterystyka-krajowych-i-zagranicznych-podrozy-mieszkancow-polski-w-2015-roku-2> Appeal date 12.04.2019 [in Polish].
- *** Статистически данни за международен туризъм в България за 2010-2016 г. [Statistics on international tourism in Bulgaria in 2010-2016] Retrieved from the website of the Ministry of Tourism of the Republic of Bulgaria <http://www.tourism.government.bg/bg/kategorii/statisticheski-danni> – Appeal date 12.04.2019 [in Bulgarian].
- *** Statystyka [Statistics] / za red. Herasymenko, S.S. (2000). Kyiv [in Ukrainian].
- *** The UK Tourist Statistics (2008). [Electronic resource]. Access mode: https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/England-documents/uk_tourist_2008.pdf – Appeal date 12.04.2019.
- *** UNWTO Tourism Highlights (2001-2017). Retrieved from <http://www.unwto.org>.
- *** World Tourism Organization (2018), *Methodological Notes to the Tourism Statistics Database, 2018 Edition*, UNWTO, Madrid, DOI: <https://doi.org/10.18111/9789284419647>
- *** World Travel Trends Report 2006-2007. [Electronic resource]. Access mode: <https://www.hospitalitynet.org/file/152002858.pdf> – Appeal date 12.04.2019.
- <http://www.insse.ro> – National Institute of Statistics (Romania).
- <http://www.nsi.bg/en> – National Statistical Institute (Republic of Bulgaria).
- <https://data.worldbank.org> – World Bank Open Data.

Submitted:
08.05.2019

Revised:
04.10.2019

Accepted and published online
09.10.2019

VISUALIZATION OF MALAY TRADITIONAL FOOD: EMOTIONAL EXPRESSION OF THE IMMIGRANTS IN MALAYSIA

Nasir YUSOFF*

Universiti Sains Malaysia, Department of Neurosciences, School of Medical Sciences,
Health Campus, 16150 Kubang Kerian, Kota Bharu, Kelantan, Malaysia, e-mail: nasirff@usm.my

Norlyiana SAMSURI

Universiti Sains Malaysia, Department of Neurosciences, School of Medical Sciences,
Health Campus, 16150 Kubang Kerian, Kota Bharu, Kelantan, Malaysia, email: lyiana_av@yahoo.com

Salahuddin AYOB

University Tunku Abdul Rahman, Psychology Department, Faculty of Arts and Social Sciences,
Kampar Campus, Jalan Universiti, Bandar Barat 31900 Kampar, Perak, e-mail: salahuddin@yahoo.com

Faruque REZA

Universiti Sains Malaysia, Department of Neurosciences, School of Medical Sciences,
Health Campus, 16150 Kubang Kerian, Kota Bharu, Kelantan, Malaysia, email: faruque@usm.my

Citation: Yusoff, N., Samsuri, N., Ayob, S., & Reza, F. (2019). VISUALIZATION OF MALAY TRADITIONAL FOOD: EMOTIONAL EXPRESSION OF THE IMMIGRANTS IN MALAYSIA. *GeoJournal of Tourism and Geosites*, 26(3), 905–915. <https://doi.org/10.30892/gtg.26318-406>

Abstract: Adapting to the new home settlement has significant implications on psychological dimension. This study aims to examine the emotional expression of the immigrants towards the Malay traditional food - the cultural heritage of the ethnic majority in Malaysia, in comparison to Malaysian Malay and Malaysian non-Malay. Through the visualization approach, participants were asked to respond to a series of Malay traditional food images and self-rated their emotional expression by using the Self-assessment Manikin. Emotional expression was significantly lower in immigrants in comparison to Malaysian Malay and Malaysian non-Malay. Acculturation (tendency towards own cultural heritage) factor explained 6% of the variance of emotional expression of the immigrants. Immigrants are undergoing an emotional adaptation while settling in new home.

Key words: Traditional food, immigrant, emotional expression, valence

* * * * *

* Corresponding author

INTRODUCTION

Malay Traditional Food

The Malay ancestry had brought a wide variety of traditional food to the Malay community in Malaysia such as *ketupat palas*, *lemang*, *nasi lemak* and so on. These cuisines had been given recognition by Department of National Heritage Malaysia as traditional food of Malay (Department of National Heritage, Malaysia, 2019). Traditional Malay food is often seen during Islamic festivals. Some of the Malay traditional food such as *ketupat palas* are believed to have existed as early as the 15th century. Today, traditional Malay food is served in official events besides during Islamic celebrations. Thus, these Malay traditional foods have become an Islamic and Malay identity.

The existence of Malay traditional food is closely intertwined with the development of Malay history (Milner, 2010). Malay traditional food as a symbol of Malay civilisation was found to develop rapidly in the era of the Malacca Sultanate (Alexanderll, 2006; Wolters, 1999). At that time, Malay customs (e.g. Malay traditional food and Malay language) were developed and spread widely by traders who sailed around Southeast Asia for trading. Hence, this indirectly caused Malay traditional food to be known at that time. Moreover, the introduction of the Islamic religion in the 12th century among Malay societies formed a unique Malay custom and identity of the Malay people. During that era, Malay traditional food is closely associated with Islamic teaching and life principle.

Perspective of Food in Non-Malaysian

The existence of Non-malaysian population in Malaysia may come from many sources and reasons such as tourism (short and long staying), as workers (short and long contract) and as post-graduate students. According to Hall et al. (2004), food can be one of the important motives among travellers (especially tourism) in planning their travelling to other countries. Relying upon the intensity and the extent of the influence of food as a form of motivation to undertake a journey, Hall et al. (2004) provide three forms of tourists as below:

a) Food as primary motive. In this form, tourism can be classified into three forms which are gourmet tourism, gastronomic tourism and cuisine tourism. The differences of these three kinds of tourism is depicted in Table 1.

b) Food as secondary motive. Also known as culinary tourism

c) Attention in food and food degustation is of lesser importance to other travellers

Table 1. Different Type of Tourism According to the Food as Primary Motive

Type of tourism	Characteristics
Gourmet tourism	<ul style="list-style-type: none"> • Small percentage than gastronomic and cuisine tourism • Focusing on food tasting for appreciation and this degustation is the largest of all
Gastronomic tourism	<ul style="list-style-type: none"> • Almost like gourmet • Interest in culinary products degustation is of primary importance. • Emphasizes on quality, status, and prestige • Willing to accept a wider range of gastronomic products • Involved laymen who are less demanding tourists (compared to gourmet tourism)
Cuisine tourism	<ul style="list-style-type: none"> • Focus on the production of certain agricultural products or some traditional culinary specialties. • Tasting and learning about the traditional local culinary specialties.

According to Hjalager and Richard (2002), food and culinary tourism reflects a certain kind of national cultural heritage which plays a role in capturing the attention (interest) of potential tourist to learn more about the history of a territory based on the customs and traditions in gastronomy. This type of tourism which involves both food and

culinary includes a variety of activities ranging from food tasting, to visiting restaurants with the purpose of food pleasure, cooking shows and demonstrations, to farmers markets, gastronomic festivals, food fairs or similar events. Both urban and rural tourism in terms of place of realisation, determine the possible variants of its form, whether it is towards agro-tourism, festival tourism, or even other forms. In addition, according to Matlovičová and Pompura (2013) as based on the point of view of the culinary tourism, the focus of tourist in travelling is based on several perspectives as below:

- (a) Tourist who see eating as an inevitable part of the travelling experience
- (b) Tourist who choose both destination and activities related based on food and the aim of enjoying the excepted gastronomy experience
- (c) As a means or an inevitable part of a tourist journey or as a goal of a tourist journey.

The interest towards the food heritage of certain countries, in fact, also depend on the 'brand' of the country such as the famous history of the country that attract the attention of many people to have a visit (Matlovicova & Kormaníková, 2014). Other than that, the destination image of the chosen country for travelling and possibilities of its formation indicated preference of good food as a functional (tangible) characteristic that need to be achieved (Matlovicova & Kolesarova, 2012)

Visualization, Emotion and Food

Perception towards a picture or visualization can be an indicator to determine emotional tendency. Thus, this approach of visualization technique has been used by many researchers in the field of psychology to understand perception (e.g. Peterson & Kimchi, 2013; Wagemans et al., 2012) and really depends on a person's goal and concentration (e.g., Vecera et al., 2004; Desimone & Duncan, 1995). On the surface, perception towards visualization is a person's ability to interpret a subject (or its environment), which depends on the lighting towards an object in the spectrum it is able to receive. In reality (outside the laboratory), both human and animal always go through the process of visualization or perception by which information from its surrounding is integrated for survival. This research which is based on visualization, in fact, not only involves physical eye solely, but also involves both the biological and psychological function. Therefore, it becomes a significant approach and is used especially in the field of cognitive neuroscience, psychology and linguistics.

In addition, since a few decades ago, the principle of visualization which is known as a theory by Gestalt has helped many researchers to understand perception (Koffka, 1935; Kohler, 1938). This theory has contributed and solved many questions in the field of visual science and applied to the field of emotion research. In the field of emotion research, the valance element is an element that translates a person's subjective experiences which can be measured in a continuum of 'pleasure-displeasure' (Russell, 1991). Hence, valence is an element inside someone that gives feedback to positive stimulation and also negative stimulation that is triggered by various resources in shape of object or non-object. It is clear that valence is emphasized as a basic and prime component in one's emotional life (Barrett, 2006 a, b) and is thoroughly detailed in many psychology models (Rolls, 1999; Russell, 2003; Smith & Ellsworth, 1985; Scherer, 1984).

The basic theory of emotion such as Circumplex Model of Affect pointed out that valence is an emotional element that indicates linear relationship with another emotional element (i.e. arousal) in the human psychobiological system. This theory suggests that the pleasant and unpleasant feeling of an individual is basically activated by positive and negative valence in emotional systems (Posner et al., 2005). Hence, valence is high in some individuals and is lower than other individuals, depending on the focus (Barrett, 2006c). In relation to this valence, it is suggested that factors such as past experiences, similarities in perception and contextual interpretation are things that affect the subjective experience of

valence (Posner et al., 2005; Russell, 2003). Emotional effects are very influential in nutritional context (Macht & Simons, 2000). Negative emotions especially (such as depression and stress) are found to be significantly affecting food intake (Mehrabian, 1980). This is supported by several studies that investigate the impact of emotions (negative and also positive) on food intake (Lyman, 1982; Patel & Schlundt, 2001). Other findings take pressure or cognitive capacity (Lattimore & Caswell, 2004; Wallis & Hetherington, 2004; Herman & Polivy, 1984) as a factor that may affect the cognitive system associated with controlling food intake. This study is implemented to look into the influence of social phenomenon of acculturation on the emotional dimension (related to traditional food) of immigrants. It is reported that the social phenomenon of acculturation (known as “the process of cultural change that occurs when individuals from different cultural backgrounds come into prolonged, continuous, first hand contact with each other” – Redfield et al., 1936, p. 146) has indicated significant implication on the psycho-behavioural (i.e. dietary pattern) of the immigrants (e.g. Satia-Abouta et al., 2002).

Two possibilities that we can expected, as based on the previous studies. First, immigrants tend to maintain their traditional dietary. For example, the scenario that can be seen among South Asians people who migrated and were living in America. They were more likely to maintain their traditional diets than American diet (Wang et al., 2016). This was also observed among Arab people who migrated to America. They were trying as much as they could to maintain the original preparation of their traditional meal while living as an immigrant in America (Tami et al., 2012). Similarly, previous study reported that Arab Muslim mothers in Canada retained traditional food preparation even in the challenge of other contemporary food from the host country (Aljaroudi, 2019).

Secondly, immigrants prefer new home dietary than their country origin dietary. For example, people who were born in Thailand and had lived in the United States for at least 3 months, were asked on the food preference between Thai food and American food. Surprisingly, they indicated preference for the American food (Sukalakamala & Brittin, 2006). This tendency of food preference was slightly different among the Filipino American immigrants. They were observed to adapt with both cultures – their country origin dietary and American dietary as well (Dela Cruz et al., 2013).

Even though the context of traditional food and daily eating food is slightly different, the previous studies lead us to make some hypothesis justification. As described above, we tend to hypothesize that immigrants in Malaysia had a strong feeling towards their own food tradition, and thus, tend to express low emotional response when viewing Malay traditional food – the food of the ethnic majority in Malaysia. There are several important possibilities that guide us with this postulation.

First, the immigrants prefer their own cultural heritage than the cultural heritage of the new settling country. Throughout food, they were maintaining connection with their home cultural heritage (Koc & Welsh, 2017). Another reason is that, the easiness of finding ingredients in stores is a factor that lead the immigrants to be convenient to prepare their traditional food at home and have their meal with family rather than eating outside that may not suit their taste (Paxton et al., 2017).

In addition, we proposed the regression model of selected socio-demographic (age and duration of staying) and acculturation (tendency towards own cultural heritage, tendency towards new settling (Malay) cultural heritage) as factors that predict the emotional expression of the immigrants towards the Malay traditional food. This postulation was based on several studies that pointed out the significant contribution of these factors in the issue of immigrants. For example, South Asian people who migrated to America, increased in age was likely to be associated with more traditional home diets (Wang et al., 2016). This age effect was also observed among

Iraqi immigrants that settled in Malaysia in which the factors of age indicated significant effect on their physical and mental health (Aqil et al., 2011). Meanwhile, the factor of the duration of staying in the new settling country was critically reviewed in Ro (2014). In this review, the negative impact of acculturation in Asian immigrants in United States was evaluated to observe the effect of the staying duration on the health status of immigrants. Throughout this study, we are interested to examine (1) the emotional expression of the immigrants in Malaysia (in comparison to Malaysian - Malay and non-Malay ethnicities) towards the Malay traditional food by using visualisation approach and (2) Factors such as immigrant's age, duration of living in Malaysia and acculturation that predict their emotional expression towards Malay traditional food. It is to note that, we are expanding the scope of 'tourist' by including participants from two groups - new comers and those who have been living in Malaysia for a certain period of time. Thus, this paper is reporting and discussing the issue of tourist from the perspective of immigrants who are travelling to Malaysia.

MATERIALS AND METHODS

Participants

In the cross-sectional study, a total of 335 participants were sampled conveniently from the population in one local university. Female gender indicated the large proportion of the participants. Participants with uncorrected vision and indicated history of affective disorder were excluded from the study. Malaysian Chinese who were born in a mix-marriage family (Malay and Chinese, Malay and other ethnicity, Chinese and other ethnicity) were also excluded from the study. Similarly, immigrant participants who were born in a mix-marriage family (Malaysian and non-Malaysian) or married with Malaysian were also excluded from the study.

Procedure

The study protocol was approved by the Human Ethical Committee (Reference Number: USM/JEPeM17090391). The purpose of study was fully explained to the participants and written informed consent was provided upon agreement to participate in the study. All participants could withdraw from the study as participation was on a voluntary basis. Visualization approach was undertaken in which participants were asked to self-rate their emotional expression while viewing a series of Malay traditional food pictures (35 pictures) that were projected onto the screen, by using the Self-Assessment Manikin (SAM) (Bradley & Lang, 1994). The brightness and size of the pictures was adjusted and standardized. In addition, participants completed the socio-demographic questionnaire and the Vancouver Index of Acculturation (VIA) scale.

1. The Malay Traditional Food Images

The internal consistency of 35 Malay traditional food images was excellence with Cronbach's alpha of 0.90. A series of pictures consists different type of Malay traditional food such as nasi lemak, lemag, ketupat palas and so on. All images are in the public domain (uncopyrighted) that were taken from the internet. These pictures have been declared as the tangible cultural heritage of Malaysia (food category) by the National Heritage Department (2018). The content validity of the pictures as cultural heritage of Malay was determined and confirmed by three panels (two academicians and one cultural officer) who were expert in Malay cultural heritage. Experts viewed and rated the relevance of the presented images as a Malay cultural heritage based on 4-point scale (Davis, 1992) as follows – 1 = not relevant, 2 = somewhat relevant, 3 = quite relevant, and 4 = highly relevant. Content Validity Index (CVI) was used to determine the content validity of the images and calculated as follow:

Number of agreements for each picture from three experts / Number of experts

All images indicated the content validity index for individual items (I-CVI) of one - the required value for content validity as suggested by Polit & Beck (2006). None of images indicated the value of less than one. Thus, all 35 pictures were proceeded as a stimulus in this study.

2. The Self-Assessment Manikin (SAM):

The Self-Assessment Manikin (SAM) is a non-verbal single scale that quantifies three main domains of emotion - valence, arousal, and dominance (Bradley & Lang, 1994). Valence - the domain of emotion that is being focused in this study, is a single item scale that quantifies the state of valence as the intrinsic attractiveness (positive valence) or aversiveness (negative valence) of an event, object, or situation.

It ranges from high pleasantness (score of 9) to minimal pleasantness (score of 1). The SAM has been widely used as a cost- and time-effective measure of emotion (e.g. Bynion & Feldner, 2017; Geethanjali et al., 2017).

3. Vancouver Index of Acculturation (VIA)

The VIA is a 20 items scale that quantifies the magnitude of the acquisition of the new (host) cultural tendencies from the loss of old (heritage) cultural tendencies (Paulhus, 2013). Ten items (odd-numbered) are the question pertaining to the respondent's expression to their home cultural heritage. For example, "I often participate in my heritage cultural traditions". Meanwhile other 10 items (even-numbered items) are the questions related to their expression towards new settling cultural heritage. For example, "I often participate in mainstream [Malay] cultural traditions". Some change was made to suit this study. The "American" in the 10 original items of even-numbered questions was replaced with "Malay". For example, "I enjoy American entertainment (e.g. movies, music)" was replaced to "I enjoy Malay entertainment (e.g. movies, music)". The psychometric properties of VIA have been reported elsewhere (Ryder et al., 2000). In this study, the internal consistency of the scale is excellent with Cronbach's alpha of 0.89.

Statistical Analysis

Data was analyzed with the Statistical Package for the Social Sciences (SPSS) Version 23. Two analysis were undertaken - (1) the One-way analysis of variance to quantify the magnitude of the emotional expression of the immigrants (non-Malaysian), in comparison to Malaysian group (Malay and non-Malay ethnicities); (2) the regression model was proposed to observe whether the factor of acculturation (tendency towards own cultural heritage versus tendency towards new settling cultural heritage) in combination with other factors (age and duration of staying) would predict the emotional expression of the immigrants towards the cultural heritage of the new settlement (i.e. Malay traditional food).

RESULTS

The socio-demographic profile and related information of the participants is depicted in Table 2. Result of the One-way ANOVA indicated significant difference of the emotional expression between three groups - Malaysian Malay, Malaysian non-Malay and immigrants [$F(2, 332) = 6.86, p < 0.01$ (Table 3)]. Pairwise comparison from Bonferroni method indicated the significant difference (1) between Malaysian Malay and Immigrants (Mean difference=13.83, SE=4.57, $p < 0.001$), (2) between Malaysian Malay and Malaysian non-Malay (Mean difference=16.02, SE=4.85, $p < 0.01$). Meanwhile, no significant difference was observed between Malaysian non-Malay and immigrants (Mean difference=2.20, SE=4.87, $p > 0.05$). In the second analysis, the Pearson correlation was undertaken to determine the correlation between dependent variable (i.e. emotional expression of the immigrants) and independent variables (i.e. age, duration of staying in

Malaysia, acculturation score (tendency towards own cultural heritage) and acculturation (tendency towards Malay cultural heritage). Result indicated that only the acculturation score (own culture) correlated significantly with the emotional expression of immigrants ($r=0.24$, $p<0.001$) (Table 4). Next, these two variables were modelled in the regression analysis (stepwise method) with emotional expression of immigrants as dependent variable and acculturation (tendency towards own cultural heritage) as independent variable. Result indicated that the acculturation (tendency towards own cultural heritage) factor explained 6% of the variance of the immigrants' emotional expression towards Malay traditional food [$R^2= 0.06$; $F(1, 117) = 7.13$; $p<0.01$] (Table 5).

Table 2. Socio-demographic Profile and Related Information

	Malaysian Malay (N=121)	Malaysian non-Malay (N=95)	Immigrant (N=119)
Age (Mean±Standard Deviation)	23±2.70	22.39 ± 2.35	26.94±6.56
Female/Male	110/11	65/30	47/72
Emotional expression (SAM score)	230.14±39.72	214.12±30.28	216.32±34.55
Acculturation (Own culture tendency)	NA	72.05±10.96	65.44±15.94
Acculturation (Malay culture tendency)	NA	53.60±11.56	50.91±14.04
Duration of staying in Malaysia	NA	NA	5.43 ± 4.42 ¹ 36.81±24.67 ²
¹ Living in Malaysia for one year and less ² Living in Malaysia more than a year; NA=Not applicable			

Table 3. Difference of Emotional Expression in Malaysian and Immigrant

Race status	N	Mean±Standard Deviation	F	P-value
Malaysian-Malay	121	230.14±39.72	6.86	0.001
Malaysian-Non-Malay	95	214.12±30.28		
Immigrant	119	216.31±34.55		

Table 4. Correlation Between Emotional Expression of Immigrant and Other Associated Factors

Variables	Pearson correlation (r)
Emotional expression (Dependent variable)	-
Age	0.16
Duration of staying in Malaysia (month)	0.15
Acculturation (tendency towards own cultural heritage)	0.24*
Acculturation (tendency towards Malay culture heritage)	0.11
*Correlation is significant at the 0.01 level (2-tailed)	

Table 5. Regression Model of on Emotional Expression and Acculturation
(Tendency Towards Own Cultural Heritage) in Immigrant

Variable	Standardized Coefficients Beta	R ²	F	P-Value
<i>Dependent:</i> Emotional expression				
<i>Independent:</i> Acculturation (tendency towards own culture)	0.24	0.06	7.13	0.009

DISCUSSION

Two important findings are highlighted in this study. First, the emotional expressions of the immigrants towards the Malay traditional food visualization were significantly lower than Malaysian Malay, however indicated similarity with the Malaysian

non-Malay group. Second, the emotional expression of the immigrants towards the Malay traditional food visualization was predicted by the acculturation factor (their tendency towards home cultural heritage). The first finding that pointed out the preference of immigrants towards their home food than new home traditional food, certainly, could be expected. Food is a main element in the identity of one's ethnicity and the consumption of food is indeed an exhibition of a cultural practice (Koc & Welsh, 2017). For this reason, the cultural behaviour was maintained in immigrant to have a connection between their current life and home cultural tradition. It could also be speculated that the taste of new home food is an important matter that did not attract the immigrants.

Perhaps, immigrants need more time to familiarize themselves with the new home environment. Familiarizing to new home tradition is important to adapt with the original culture of the immigrants. Ishak et al. (2012) pointed out that the identity of ethnic food is the result from the adjustment and adaptation with other ethnic food identity - the possible phenomenon that could occur. This is also a reason in immigrants who still have a strong connection with their traditional food even though their meal pattern changed as a result of the influence of the new home recipe (Vallianatos & Raine, 2008). Another reason that need to be considered was that, immigrants prefer to prepare their traditional meal at home (rather than going out and looking for local food (new home traditional food) because they felt that their food is healthier as well as the ingredient for preparing the food is easy to get (Paxton et al., 2017). All these reasons have significant impact on immigrant's emotional expression towards the cultural heritage of the Malaysian Malay (the majority culture of Malaysia) as emotion is the influential dimension especially in the context of food (Patel & Schlundt, 2001).

The results of this study that used the visualization approach (visualization of Malay traditional food) is important as an indicator and predictive of emotional tendency (Peterson & Kimchi, 2013; Wagemans et al., 2012). In this study, the emotional tendency of immigrants towards Malay traditional food is low compared to Malaysians (Malays and Non-Malays). The emotional distinction between immigrant groups and Malaysians (Malays and Non-Malays) have resulted from the factors of different goals and concentration in visualization. In addition, visualization approach relies heavily on one's goal in viewing visuals (e.g., Desimone & Duncan, 1995; Egeth & Yantis, 1997; Posner, 1980) and are hugely influenced by one's concentration factor (e.g. Freeman et al., 2001; Han et al., 2005). Due to emotional tendency and strong connection of immigrant groups towards their traditional food, thus, this led to low concentration in visualization compared to Malaysians. This is related to the goal factor that has a link with the integration of information from environment. Due to the low attraction towards the Malay traditional food among the immigrants, therefore, the goal of the visualization process is not well-developed. Moreover, the findings from this study have been widely discussed by the Gestalt Theory – a theory that has enormous contribution and solved many questions in the field of visual science. In general, this theory coined that an image is seen through visualization and will be interpreted more in wider context.

Hence, in this present finding, it can be said that the immigration group visualization capabilities in the context of Malay traditional food are less functioning. This is because, immigrants went through a process of visualization that was out of their emotional tendencies. Weakness in emotion will impair the visualization because emotion is one of the important factors in visualization. The emotion itself is developed based on the factors such as past experiences and contextual interpretations (Posner et al., 2005; Russell, 2003). In the second finding, acculturation score (i.e. preference towards home cultural heritage) predicted the immigrant's emotional expression towards the Malay traditional food visualization. This phenomenon of 'emotional acculturation' is not

surprised as it has been discussed and reviewed intensively (e.g. De Leersnyder, 2017). This link (acculturation and emotion) increasingly supported by several studies. For example, a recent finding noted that acculturation as one of the factors that significantly affect the mental health of the immigrant (George et al., 2015) which closely explain the prediction of acculturation on emotional expression that we observed in this study.

Meanwhile, in Tami et al. (2012), the changing of behaviour (toward positive behaviour) indicated as an important consequence from acculturation. Furthermore, beside the influence of acculturation on dietary preference (Lee et al., 2013), indirect finding on the influence of acculturation among immigrants living in Malaysia pointed out the importance of gaining the cultural knowledge to eradicate the emotional defect in dealing with intercultural difficulties (Awang-Rozaimie, 2011). This study finding is supported by other studies that observed the effect of acculturation beyond the psychological pinpoint. Acculturation was reported as a sociology phenomenon that has a significant impact on immigrants' health risk through the dietary change (Vargas & Jurado, 2016, Schaefer et al., 2009). The acculturation was also observed to expand its effect on the family behaviour as well (Chen, 2009; Soto et al., 2017).

CONCLUSION

Immigrants showed less emotional expressions (than Malaysians) to Malay traditional food – a situation that probably occurs in the first phase of an immigrant life when settling in new home. In this first phase, immigrants are trying to adapt themselves with the new culture. This process of adapting has given significant impact on their emotional dimension as immigrants. Future research should clarify the adapting transition that determine the change of emotions among immigrants.

Acknowledgement

The authors wish to thank the Ministry of Education, Malaysia for the Fundamental Research Grant Scheme (Grant Number: 203.PPSP.6171204) and Universiti Sains Malaysia for research facilities.

REFERENCES

- Alexanderll, J. (2006). *Malaysia Brunei & Singapore*. Singapore: New Holland Publishers.
- Aljaroudi, R., Horton, S., & Hanning R.M. (2019). Acculturation and dietary acculturation among Arab muslim immigrants in Canada, *Canadian Journal of Dietetic Practice and Research*, 25:1-7.
- Aqil, M.D., Hisham, S.I., Thaaer, M.D. & Ali, K. A. (2011). Health related quality of life among Iraqi immigrants settled in Malaysia. *BMC Public Health*, 11: 407.
- Awang-Rozaimie, A.S. (2011). Expatriates' emotion reactions toward Malaysian multicultural society. *European Journal of Social Sciences*, 25 (2): 171.
- Barrett, L.F. (2006a). Are emotions natural kinds? *Perspectives on Psychological Science*, 1 (1): 28-58.
- Barrett, L.F. (2006b). Solving the emotion paradox: categorization and the experience of emotion. *Personality and Social Psychology Review*, 10 (1): 20-46.
- Barrett, L.F. (2006c). Valence is a basic building block of emotional life. *Journal of Research in Personality* 40: 35-55.
- Bradley, M.M., & Lang, P.J. (1994). Measuring emotion: The Self-Assessment Manikin and the semantic differential. *Journal of Behavior Therapy and Experimental Psychiatry* 25 (1): 49-59.
- Bynion, T-M., & M. T. Feldner (2017). Self-Assessment Manikin. In Zeigler-Hill & T. K. Shackelford (Ed.). *Encyclopedia of personality and individual differences* (2nd ed., pp.1-3). Switzerland: Springer International Publishing.
- Chen, J.L. (2009). Household income, maternal acculturation, maternal education level and health behaviors of Chinese-American children and mothers. *Journal of Immigrant and Minority Health*, 11(3): 198-204.
- Davis, L. (1992). Instrument review: Getting the most from your panel of experts. *Applied Nursing Research* 5: 194-197.
- Dela Cruz, F.A., Lao, B.T., & Heinlein, C. (2013). Level of acculturation, food intake, dietary changes, and health status of first-generation Filipino Americans in Southern California. *Journal of the American Association of Nurse Practitioners*, 25(11): 619-30.
- De Leersnyder, J. (2017). Emotional Acculturation: A first review. *Current Opinion in Psychology*, 17: 67-73.

- Department of National Heritage, Malaysia (2019). Ministry of Tourism and Culture Malaysia. Retrieved from www.heritage.gov.my/index.php/ms/
- Desimone, R. & Duncan, J. (1995). Neural mechanisms of selective visual attention. *Annual Review of Neuroscience* 18: 193-19.
- Egeth, H.E., & Yantis, S. (1997). Visual attention: Control, representation and time course. *Annual Review of Psychology*, 48: 269-297.
- Freeman, E., Sagi, D., & Driver, J. (2001). Lateral interactions between targets and flankers in low-level vision depend on attention to the flankers. *Nature Neuroscience*, 4 (10): 1032-1036.
- Geethanjali, B., Adalarasu, K., Hemaprabha, A., Kumar, S.P., & Rajasekeran, R. (2017). Emotion analysis using SAM (Self-Assessment Manikin) Scale. *Biomedical Research*, 28 (Special Issue): S18-S24.
- George, U., Thomson, M.S., Chaze, F., & Guruge, S. (2015). Immigrant mental health, a public health issue: looking back and moving forward. *International Journal of Environmental Research and Public Health*, 12(10): 13624-13648.
- Hall, C.M., Sharples, L., Cambourne, B., Macionis, N., Mitchell, R. & Johnson, G. (2004). Wine tourism around the world - development, management and markets. Burlington, MA: Elsevier Butterworth-Heinemann.
- Han, S., Jiang, Y., Mao, L., Humphreys, G.W., & Gu, H. (2005). Attentional modulation of perceptual grouping in human visual cortex: Functional MRI studies. *Human Brain Mapping*, 25: 424-432.
- Herman, C.P., & Polivy, J. (1984). A boundary model for the regulation of eating. *Eating Disorders*, 984 (62):141-56.
- Ishak, N., Mohd Zahari, M.S., Md Sharif, M.S., Rosmaliza, M., & Hannita, S. (2012). Acculturation, foodways and Malaysian food identity. *Current Issues in Hospitality and Tourism Research and Innovations - Proceedings of the International Hospitality and Tourism Conference*, pp. 359-363.
- Kimchi, R. (2009). Perceptual organization and visual attention. *Progress in Brain Research* 176: 15-33.
- Koc, M. & Welsh, J. (2017). Food, Identity and Immigrant Experience. *Canadian Diversity*, 1(1): 46-48.
- Koffka, K. (1935). *Principles of Gestalt Psychology*. New York: Harcourt Brace Jovanovich.
- Kohler, W. (1938). Physical Gestalten. In Ellis, W.D (Ed.). *A sourcebook of Gestalt psychology* (pp.17-54). London, England: Routledge & Kegan Paul.
- Lattimore, P. & Caswell, N. (2004). Differential effects of active and passive stress on food intake in restrained and unrestrained eaters. *Appetite*, 42: 167-173.
- Lee, S., O'Neill, A.H., Ihara, E.S., & Chae, D.H. (2013). Change in self-reported health status among immigrants in the United States: associations with measures of acculturation. *PLoS One*, 8(10): e76494.
- Lyman, B. (1982). The nutritional values and food group characteristics of food preferred during various emotions. *Journal of Psychology*, 112: 121-127.
- Macht, M. & Simons, G. (2000). Emotions and eating in everyday life. *Appetite*, 35: 65-71.
- Matlovicova, K. & Kormanikova, J. (2014). City Brand-Image Associations Detection. Case Study of Prague SGEM *International Multidisciplinary Scientific Conferences on Social Sciences and Arts, SGEM 2014*, Psychology & Psychiatry, Sociology & Healthcare, Education, Conference Proceedings, Volume II., Sociology and Healthcare, Albena, Bulgaria, ISBN 978-619-7105-23-0, ISSN 2367-5659, pp. 139-146.
- Matlovicova, K. & Kolesarova, J. (2012). Destination image and possibilities of its formation: a case study of the image of Thailand as a tourist destination perceived by Slovaks. *Central European Regional Policy and Human Geography*, Year II, no. 1, 2012, HU ISSN 2062-8870, HU E-ISSN 2062-8889, Article no. 2012-1, University of Debrecen, Hungary. Retrieved from: http://www.cerphg.unideb.hu/PDF/2012_1/1_kveta_nyomda.pdf, pp. 5-20.
- Matlovicov, K. & Pompura, M. (2013). The culinary tourism in Slovakia case study of the traditional local sheep's milk products in the regions of Orava and Liptov. *GeoJournal of Tourism and Geosites*, 2 (12): 129- 144.
- Mehrabian, A. (1980). *Basic Dimensions for a General Psychological Theory*. Cambridge: Oelschlager, Gunn & Hain.
- Milner, A. (2010). *The Malays (The Peoples of South-East Asia and the Pacific)*. United Kingdom, UK: Wiley-Blackwell.
- Patel, K.A., & Schlundt, D.G. (2001). Impact of moods and social context on eating behavior. *Appetite*, 36: 111-118.
- Paulhus, D.L. (2013). *Vancouver Index of Acculturation (VIA) - Measurement instrument database for the social science*. Retrieved from www.midss.ie.
- Paxton, A., Pillai, A., Phelan, K., Cevette, N., Bah, F., & Akabas, S. (2017). *Dietary acculturation of recent immigrants from West Africa to New York City*. Retrieved from <http://journals.openedition.org/faceface/1023>.
- Peterson, M.A., & Kimchi, R. (2013). Perceptual organization in vision. In D., Reisberg (Ed.). *Oxford Handbook of Cognitive Psychology* (pp.9-31). New York: Oxford University Press.
- Polit, D.F., & Beck, C.T. (2004). *Nursing research: Principles and methods* (7th ed.). Philadelphia: Lippincott, Williams, & Wilkins.
- Posner, M.I. (1980). Orienting of attention. *Quarterly Journal of Experimental Psychology* 32: 3-25.
- Posner, J., Russell, J.A., & Peterson, B.S. (2005). The Circumplex Model of Affect: An integrative approach to affective neuroscience, cognitive development, and psychopathology. *Development and Psychopathology*, 17: 715-34.
- Redfield, R., Linton, R. & Herskovits, M.J. (1936). Memorandum for the study of acculturation. *American Anthropologist*, 38:149-152.

- Ro, A. (2014). The longer you stay, the worse your health? A critical review of the negative acculturation theory among Asian immigrants. *International Journal of Environmental Research and Public Health*, 11(8): 8038–8057.
- Rolls, E. T. (1999). The brain and emotion. New York: Oxford University Press.
- Russell, J. A. (1991). Culture and the categorization of emotions. *Psychological Bulletin*, 110: 426–450.
- Russell, J.A. (2003). Core affect and the psychological construction of emotion. *Psychological Review*, 110:145–72.
- Ryder, A.G., Alden, L., & Paulhus, D.L. (2000). Is acculturation unidimensional or bidimensional? A head-to-head comparison in the prediction of demographics, personality, self-identity, and adjustment. *Journal of Personality and Social Psychology*, 79: 49–65.
- Satia-Abouta, J., Patterson, R.E., Neuhouser, M.L., & Elder, J. (2002). Dietary acculturation: applications to nutrition research and dietetics. *Journal of the American Dietetic Association*, 102(8): 1105–18.
- Schaefer, S.E., Salazar, M., Bruhn, C., Saviano, D., Boushey, C., & Van Loan, M.D. (2009). Influence of race, acculturation, and socioeconomic status on tendency toward overweight in Asian-American and Mexican-American early adolescent females. *Journal of Immigrant and Minority Health*. 11(3): 188–97
- Scherer, K.R. (1984). On the nature and function of emotion: A component process approach. In K.R., Scherer & P., Ekman (Ed.). *Approaches to emotion*. Hillsdale, NJ: Lawrence Erlbaum.
- Smith, C. A., & Ellsworth, P. C. (1985). Patterns of cognitive appraisal in emotion. *Journal of Personality and Social Psychology*, 48:813–838.
- Soto, S.H., Arredondo, E.M., Marcus, B., Shakya, H.B., Roesch, S., & Ayala, G.X. (2017). Effects of Latino children on their mothers' dietary intake and dietary behaviors: The role of children's acculturation and the mother-child acculturation gap. *Social Science Medicine*. 191:125–133.
- Sukalakamala, S. & Brittin, H.C. (2006). Food practices, changes, preferences, and acculturation of Thais in the United States. *Journal of the American Dietetic Association*. 106(1): 103–8.
- Tami, S.H., Reed, D.B., Boylan, M., & Zvonkovic, A. (2012). Assessment of the effect of acculturation on dietary and physical activity behaviors of Arab mothers in Lubbock, Texas. *Ethnicity & Disease*, 22(2):192–7.
- Vallianatos, H. & Raine, K. (2008). Consuming food and constructing identities among Arabic and South Asian immigrant women. *Food Culture and Society an International Journal of Multidisciplinary Research*, 11(3): 355–373
- Vargas, P. & Jurado, L-F. (2016). Dietary acculturation among Filipino Americans. *International Journal of Environmental Research and Public Health*, 13(1): 16.
- Vecera, S.P., Flevaris A.V., & Filapek, J.C. (2004). Exogenous spatial attention influences figure-ground assignment. *Psychological Science* 15 (1): 20–26
- Wagemans, J, Elder, J.H., Kubovy, M., Palmer, S.E., Peterson, M.A., & Singh, M. (2012). A century of Gestalt psychology in visual perception: I. Perceptual grouping and figure-ground organization. *Psychological Bulletin*, 138 (6): 1172–1217
- Wallis, D.J. & Hetherington, M.M. (2004). Stress and eating: The effects of ego-threat and cognitive demand on food intake in restrained and emotional eaters. *Appetite* 43: 39–46
- Wang, Y., Min, J., Harris, K., Khuri, J., & Anderson, L.M. (2016). A systematic examination of food intake and adaptation to the food environment by refugees settled in the United States. *Advances in Nutrition*, 7(6):1066–1079.
- Wolters, O.W. (1999). *History, culture, and region in Southeast Asian perspectives*. Singapore: Cornell University Southeast Asia Program Publications.

Submitted:
08.07.2019

Revised:
07.10.2019

Accepted and published online
09.10.2019

THE SERVICED APARTMENT SECTOR IN THE URBAN GLOBAL SOUTH: EVIDENCE FROM JOHANNESBURG, SOUTH AFRICA

Desire GREENBERG

University of Johannesburg, Department of Geography, Environmental
Management and Energy Studies, South Africa, e-mail: dgreenberg@uj.ac.za

Jayne M. ROGERSON *

University of Johannesburg, School of Tourism and Hospitality,
College of Business and Economics, South Africa, e-mail: jayner@uj.ac.za

Citation: Greenberg, D. & Rogerson, J.M. (2019). THE SERVICED APARTMENT SECTOR IN THE URBAN GLOBAL SOUTH: EVIDENCE FROM JOHANNESBURG, SOUTH AFRICA. *GeoJournal of Tourism and Geosites*, 26(3), 916–929. <https://doi.org/10.30892/gtg.26319-407>

Abstract: The lodging sector is the focus of a substantial body of academic literature contributed from a range of disciplinary perspectives albeit mainly by hospitality management and tourism scholars. One form of lodging that has been somewhat neglected is the serviced apartment sector. This research investigates the development and characteristics of the serviced apartment sector in the urban global South with evidence drawn from Johannesburg, South Africa. The study analyses global industry reports, conducted an internet-mediated audit of serviced apartments in South Africa and qualitative interviews with key property developers and other stakeholders in the Johannesburg serviced apartment sector. It is revealed that the character of this emerging lodging form in South Africa exhibits certain parallels with the global North. Serviced apartments cater mainly for business travellers and in particular visiting professionals on short-term contract work assignments, a significant element of the changing nature of international business travel.

Key words: urban tourism, accommodation services, serviced apartments, global South; South Africa, Johannesburg

* * * * *

INTRODUCTION

Lodging is defined as temporary accommodation and can be offered across the range of different forms of establishment (Brooker & Joppe, 2014; Roberts & Shea, 2017; Manning et al., 2018; Martin et al., 2018; Shi et al., 2019). Arguably, the commercial lodging sector is now one of the world's largest industries (Timothy & Teye, 2009; Manning et al., 2018). Furthermore, as observed recently, it “plays a crucial role in the daily life of people, particularly for travellers to stay in a chosen destination”

* Corresponding author

(Köseoglu et al., 2019: 2). This said, an equally significant (if not always recognised) component of lodging is that which is non-commercial in character and occurring in people's homes usually in terms of the hosting of visits from friends or relatives (Rogerson, 2018a; Rogerson & Rogerson, 2019). The historical growth of the commercial lodging or accommodation services sector must be understood as an accompaniment to, as well as necessary foundation for, tourism development (Timothy & Teye, 2009; Rogerson & Rogerson, 2018). For tourism destinations the making and consolidation of an accommodation infrastructure is one of the prerequisites for initiating tourism expansion as well as for the building of destination competitiveness (Magombo et al., 2017; Mazilu et al., 2017). Within the specific context of destinations in the global South the evolution of an appropriate network of lodging offerings is viewed as essential for the long-term scaling-up of the contribution of tourism to national economies (Christie et al., 2013). The significance of the lodging sector for promoting tourism development in sub-Saharan Africa is stressed by Novelli (2015). Limitations in the quality and range of accommodation infrastructure can be a significant constraint to the fulfilment of the 'African dream' for tourism to be a driver for continental economic growth and livelihoods improvement (Christie et al., 2013; Novelli, 2015; Magombo et al., 2017).

The lodging sector as a whole has catalysed a substantial body of academic literature which has been contributed from a range of disciplinary perspectives but mainly by hospitality management and tourism scholars (Timothy & Teye, 2009; Morrison, 2018; Köseoglu et al., 2019). The former group, who contribute the largest share of writings about the lodging economy, focus research attention on a suite of business management issues. Among these are examination of topics such as service innovation, human resource management, reservation and information systems, customer satisfaction, service expectations, marketing, housekeeping, catering and budgeting (Timothy & Teye, 2009; Rogerson, 2013a; Edghiem & Mouzugh, 2018; Morrison, 2018; Shi et al., 2019). Emergent themes of work include the transformative impact of the Fourth Industrial Revolution on the hospitality sector (Gursoy et al., 2019). Using network analysis Köseoglu et al. (2019) provide an overview of international trends around the production of research between 1990-2016 concerning the knowledge domain of lodging. The findings of this application of advanced bibliometric analysis of literature highlight that the largest share of studies around lodging relate to questions of strategic management, marketing, resource management and revenue management (Köseoglu et al., 2019: 17). In addition, this research shows the underdevelopment of investigations around the tourism-lodging nexus. Furthermore it demonstrates that whereas the bulk of scholarship concentrates on hotels, including of lifestyle hotels, there has been a notable recent burst of writings around newer forms of lodging (Manning et al., 2018). Among these are of home-based accommodation in many developing countries (Kontogeorgopoulos et al., 2015; Mura, 2015; Sood et al., 2017; Walter et al., 2018) as well as the global boom of the accommodation sharing economy (Guttentag, 2015; Guttentag & Smith, 2017; Visser et al., 2017; Guttentag et al., 2018).

From a tourism perspective the amount of writings about the lodging sector is far less than the literature coming out of a hospitality management perspective (Rogerson, 2013a). This said, the growth and role of particular forms of lodging within tourism economies or destinations is starting to build academic interest. Over the past 15 years there has consolidated a body of tourism related research around different types of lodging service. In this regard it must be understood that the commercial lodging economy is diverse and segmented (Timothy & Teye, 2009). It encompasses accommodation types such as hotels, guest houses, resorts, boarding houses, backpacker lodges, camping grounds, caravan parks, safari lodges, timeshare, bed and breakfasts,

cruise ships, and Airbnb forms of accommodation. Over recent years these multiple forms of lodging have generated a stream of tourism-focussed contributions albeit with the largest amount of international scholarship discussing hotels (Köseoglu et al., 2019: 17). In the context of the global South a burst of relevant research investigations – mainly produced by tourism geographers – has appeared for South Africa in terms of investigations about time-share, backpacker hostels, second homes, safari lodges, bed and breakfast establishments, Airbnb as well as the country's hotel economy (Rogerson, 2010, 2011; Pandey & Rogerson, 2013; Rogerson, 2013b, 2013c, 2013d; Rogerson et al., 2013; Hay & Visser, 2014; Pandey & Rogerson, 2014; Rogerson, 2014; Visser et al., 2017; Idahosa, 2018; Rogerson, 2018b; Rogerson & Rogerson, 2019).

It is against this backdrop that the objective in this paper is to examine one particular kind of lodging establishment that so far has attracted meagre attention from researchers both in the environments of the global North and the global South (Poon, 2005; Greenberg & Rogerson, 2015, 2018). The focus is upon the emergence and characteristics of the serviced apartment sector as a new form of accommodation phenomenon within the global lodging economy. For some analysts the serviced apartment is considered by as a cross between the standard apartment and the conventional hotel (Kinuthia, 2016). Henderson & Smith (2012: 349) view serviced apartments as “a distinctive type of tourism accommodation with a range of providers” and one that “is increasing in diversity, popularity, and commercial importance in much of the world”. The international record is that the serviced apartments sector traditionally caters for particular forms of business travellers, often those on long-term assignments, which is a significant component of the changing nature of international business travel (Beaverstock et al., 2009; The Apartment Service, 2013, 2018).

This paper investigates the development and particular characteristics of the serviced apartment sector in the global South with evidence drawn from Johannesburg, South Africa. Two sections of discussion follow. The first provides a global overview of the serviced apartments sector, its characteristics and evolution. The second section turns to the empirical case of South Africa and specifically the serviced apartment market of Johannesburg, the city which has emerged as the country's prime business tourism destination (Rogerson & Rogerson, 2014, 2015; Rogerson, 2015a, 2019). In terms of research sources and methods the study combines for section one a literature search with analysis of global industry reports (The Apartment Service, 2013, 2015, 2018). For section two an internet-mediated audit of serviced apartments in South Africa is used along with a set of qualitative interviews which were undertaken with key property developers and other stakeholders in the Johannesburg serviced apartment sector. For ethical reasons only the work positions of the interviewees are revealed.

GLOBAL TRENDS IN THE SERVICED APARTMENT SECTOR

As discussed above, a serviced apartment represents an alternative form of accommodation to the conventional hotel (The Apartment Service, 2013). The definition of a serviced apartment, however, varies from country to country (Vanichvatana, 2006; The Apartment Service, 2015; Arvidsson, 2015). Indeed, both academic researchers as well as industry players acknowledge that there is no standard definition of a serviced apartment and terms such as the European ‘aparthotel’ and ‘corporate housing’ are often included (Poon, 2005; The Apartment Service, 2016). Serviced apartments can be utilised for either short or long-term stays; extended stays are generally more popular due to more favourable rates (The Apartment Service, 2013).

There is a general consensus that “serviced apartments provide short-term self-contained accommodation which consists of ‘a small kitchen or kitchenette (fully

equipped) with a living room in addition to the bedroom(s)” (Foxley, 2001: 80). For Poon (2005: 2) a serviced apartment is “fully furnished, short-term, self-contained accommodation, and to provide additional services: usually a small kitchen is included”. The attraction of this form of lodging is because of the comforts and privacy of a homely environment whilst at the same time offering the services and facilities of a hotel (Geieregger & Oehmichen, 2008; Arvidsson, 2015). This form of accommodation mostly is self-contained, offers larger living spaces, with a number of various additional services available to the traveller, dependant on the standard of serviced apartment accommodation which is on the market (Foxley, 2001; Geieregger & Oehmichen, 2008). For Deepeka and Narayanan (2018: 760) features of the contemporary serviced apartments encompass “single or double bedroom facility, studio unit with all required amenities like kitchenettes, refrigerators, microwave ovens, Internet, gym, party areas and conference rooms, including housekeeping facilities”. The provision of high levels of comfort – a ‘home away from home’ - for business professionals or other visitors is the prime consideration in the development of these properties (Greenberg & Rogerson, 2015).

Historically the serviced apartment concept originated during the 1960s in the United States to function as an alternative form of commercial lodging to full service hotels for mainly business travellers. Subsequently, this new sector of accommodation services has expanded in popularity on a global scale (Foxley, 2001; Geieregger & Oehmichen, 2008; Hong & Zhenzhen, 2013; The Apartment Service, 2013, 2015, 2016, 2018). A key driver for the global expansion of the serviced apartment sector is the growth of the practice of multinational corporations for the international assignment of employees. This form of corporate mobility is an element of globalization and represents a specific form of business travel (Beaverstock et al., 2009). Among others the work of Beaverstock (1996, 2005) documents the emergence of internal labour markets within large international enterprises (engaged in for example financial services) and the appearance of a class of transient professionals who often are involved in overseas assignments. The projections of recent surveys about global mobility trends among corporates suggests a trend towards the continued increase in such international assignments, including into emerging markets of the global South (The Apartment Service, 2018: 11). Short term business travel is another critical foundation and source market for serviced apartments globally; estimates for 2015 were that an amount of \$1.25 trillion was spent worldwide for corporate travel (including for accommodation services). As Hermelin (2012: 62) states business travel represents “a major component in the ‘space of flows’ of the global economy’ as it brings a constant and substantial flow of people from distant places for shorter or longer stays”. Another contributory factor to the international spread of the serviced apartment sector is its increasing popularity also with certain categories of leisure travellers as well as other forms of urban tourist including MICE travellers, medical tourists, and even for small numbers of those tourists visiting friends and relatives (Henderson & Smith, 2012; The Apartment Service, 2013, 2015; Hirsh, 2015; Deepeka & Narayanan, 2018; The Apartment Service, 2018). Finally, as Arvidsson (2015) points out, the occupancy rates for serviced apartments in many parts of the world are higher than those recorded for the category of traditional full service hotels.

As a result of varying definitions of serviced apartments and in particular because of the inclusion of corporate housing as part of the sector, it becomes difficult to map out precisely the ownership, operators and spatial patterns of the international serviced apartment sector. The best available data is from the industry sources and reports produced by The Apartment Service. These disclose that over the past decade the supply of serviced apartments at the global scale has recorded considerable expansion as well as geographical spread (The Apartment Service, 2013, 2018). According to industry sources,

as of January 2018 there was a total of 1 022 984 serviced apartments which operated across 1 364 different (mainly) urban locations. The tempo of expansion is evident from comparison with data for 2016/2017 which shows an increase of 19% in units and 18.8% in terms of the geographic spread of locations of serviced apartments (The Apartment Service, 2018: 14). At the international scale the geography of serviced apartments is massively dominated by the traditional markets of North America and Europe. This said, rapid growth is recorded for many parts of Asia, in particular Southeast Asia (Henderson & Smith, 2012) and in major business centres of China (Bao'er & Chengqiang, 2004; Hong & Zhenzhen, 2013; The Apartment Service, 2016). Indeed, several growing Asian business hubs such as Bangkok, Beijing, Chennai, Shanghai, Kuala Lumpur, Hong Kong and Shenzhen are some of the emerging growth poles in the spatial supply of serviced apartments (Poon, 2005, Vanichvatana, 2006; Phadungyat, 2008; Deepeka & Narayanana, 2018; The Apartment Service, 2018).

Table 1. Global Brands by Locations and Units 2018/2019
(Data source: Adapted from The Apartment Service, 2018)

Global Brand	Locations	Units
Marriott (Worldwide)	1 160	134 311
Hilton (Worldwide)	631	69 871
Extended Stay Hotels (USA)	629	69 400
The Ascott Ltd (Worldwide) including Quest Apartment Hotels	512	70 337
Intercontinental Hotel Group (Worldwide)	619	61 863
Choice Hotels (USA)	362	39 860
Accor Hotels (Worldwide)	221	24 046
Pierre & Vacances (Europe)	257	22 252
Mantra Group	127	20 100
In Town Suites	209	15 700
Frasers Hospitality (Worldwide)	74	12 607
Hyatt House	88	12 567
Studio6	120	11 496
Hawthorn Suites	108	10 613

In terms of the overall global supply of serviced apartments Tables 1 and 2 reveal the dominance of a number of leading multinational hotel chains. It is evident that major international hotel chains such as Marriott, Hilton, Accor and Intercontinental are key actors in the serviced apartment sector. The Marriott group is the most geographically spread in terms of its operations of serviced apartments followed by Hilton, Extended Stay and Intercontinental (Table 1). The list of leading operators in terms of inventory includes also a number of enterprises which are particularly specialised in the segment of serviced apartments. The most notable is the Singapore-based The Ascott Group which has been a major driver of serviced apartment growth in Pacific Asia and recently has risen in global rankings because of its acquisition of Quert, a brand which is strong in Australasia (The Apartment Service, 2018). Table 2 indicates also the several different brands that are operated by the key major enterprises who function in the serviced apartment sector. In terms of the most significant global brands these include Accor, The Ascott Group, Extended Stay, Frasers Hospitality, Intercontinental Hotels, Marriott, Choice Hotels and Pierre et Vacances. Taken together this group of eight global brands is responsible for over 40 percent of the international inventory of serviced apartments.

It is observed that within the global geography of serviced apartments the most underdeveloped region is Africa. For Africa as a whole the most recent audit data provided by The Apartment Service (2018) records a total of 9 477 apartments spread

across 166 locations. It is thus that Africa represents only 1 percent of the current global supply for serviced apartments. A significant share of the total for Africa is represented by North Africa (with Cairo and Marrakech seen as ‘hotspots’) leaving sub-Saharan Africa presently the least represented region for serviced apartments. Behind this slow growth of serviced apartments has been the limited demand for extended stay accommodation linked to the small flow of transient professionals there on assignments as compared to other regions of the world. In addition, relative to the maturity of business tourism in Europe, North America or Asia, in Africa the activity of business tourism is still expanding albeit much smaller in volume than in countries of the global North (Rogerson, 2015b).

Table 2. Global Serviced Operators by Brand 2018/2019
(Data source: Adapted from The Apartment Service, 2018)

Global Brand		Locations	Units
Accor Hotels	Adagio	102	12 000
	Mercure/Grand Mercure	58	6 049
	The Sebel	28	1 893
	Suite Novotel	33	4 104
	Total	221	24 046
The Ascott Ltd	Ascott The Residence	57	11 087
	Citadines	124	20 170
	Somerset	88	16 554
	Other Serviced Residences	44	7 114
	Tujia Somerset	15	2 687
	Quest Apartment Hotels	180	11 974
	Lyf	4	751
	Total	512	70 337
Extended Stay	Extended Stay America/Canada	629	69 400
Frasers Hospitality	Fraser Residence	14	1 792
	Fraser Suites	30	4 968
	Fraser Place	15	2 596
	Modena Residence	6	1 385
	Capri	9	1 866
	Total	74	12 607
Intercontinental	Candlewood Suites	374	35 251
	Staybridge Suites	245	26 612
	Total	619	61 863
Marriott	Marriott Executive Apartments	27	3 851
	Residence Inn	780	95 160
	Towne Place Suites	353	35 300
	Total	1 160	134 311
Pierre et Vacances	Pierre & Vacances	226	20 020
	Maeva	31	2 232
	Total	257	22 252
Choice Hotels	Mainstay Suites	58	4 309
	Suburban	69	7 314
	Woodspring Suites	235	28 237
	Total	362	39 860
Global Providers Total			434 676

Table 3 records the principal individual operators of serviced apartments in sub-Saharan Africa. It is observed that in 2016 the major global players in the serviced apartment sector were not represented in the market of sub-Saharan Africa. Indeed, the

leading enterprises by 2016 were a number of South African based enterprises with their operations mostly in that country. Across most of sub-Saharan Africa the supply of serviced apartments is thus restricted to largely unbranded or locally operated independent properties (The Apartment Service, 2016).

Table 3. Major Operators in Sub-Saharan Africa 2016/2017
(Data source: Adapted from The Apartment Service, 2016)

Operators	Locations	Apartments
Southern Sun	4	610
Courtyard Apartments – South Africa	6	451
Executive Apartments and Hotels (Sandton South Africa)	6	253
Village and Life	6	221
Three Cities Group – Bantry Bay & Nelson Rhodes Place – Cape Town	2	125
Belaire Suites - Durban	1	124
Relais Hotels	4	116
TOTAL	29	1 900

The African landscape of serviced apartments is beginning to alter. This shift is the result of a combination of factors, including improvement in the economies of several countries in sub-Saharan Africa, the concomitant rise of business travel and a rise in the share of international assignees, in particular to regional business hubs such as Lagos and Nairobi. Tichaawa (2017) records for Cameroon the appearance of serviced apartments in the country's leading business hubs. Industry sources reveal that plans have been announced by major global serviced apartment brands to expand their operations into Africa (Ueberroth & Rai, 2018). The Marriott has opened its first Marriott Executive Suites in Addis Ababa (Ethiopia) and is planning to launch an additional 12 properties across the region by 2020 (Kinuthia, 2016).

Other leading enterprises also are potentially going to make an African footprint. It is reported that Residence Inn is looking to open operations in both Accra (Ghana) and Lagos (Nigeria). In addition, Frasers, The Ascott Ltd and Adagio are targeting the market for serviced apartments in sub-Saharan Africa (The Apartment Service, 2016: 53). Beyond a growth in branding a particular trend observed in sub-Saharan Africa is for the construction of serviced apartments as part of mixed-use property development projects (Kinuthia, 2016). In addition, in the case of Kenya (at least), it is recorded that sectional ownership of such properties is on the rise (The Apartment Service, 2018).

SERVICED APARTMENTS IN SOUTH AFRICA: THE JOHANNESBURG RECORD

The growth and character of the serviced apartment sector in Johannesburg must be understood in relation to the nature of the city's tourism economy and most importantly its role as business capital for South Africa and beyond for the wider region of Southern Africa. Two subsections of material are provided in terms of (1) an examination of the structure of Johannesburg's tourism economy; and (2) the organization and dynamics of the city's serviced apartment sector.

The Tourism Economy of Johannesburg

In common with major urban tourism destinations globally Johannesburg's tourism economy involves a mix of travellers for purposes of leisure, business, health and visiting friends and relatives. Drawing upon the local level tourism base of IHS Global Insight Table 4 provides a profile of the current (2018) state of Johannesburg's tourism economy. Table 4 captures major aspects of the contemporary tourism economy of City of Johannesburg. It discloses several important findings. First, that in

terms of total trips and total bednights Johannesburg is South Africa's most visited tourist destination with the largest share of tourism trips represented by domestic travellers. Second, in respect of reasons for visit the results on Table 4 reveals that the city is a multi-purpose destination which would be typical of any major metropolitan centre.

Table 4. Johannesburg's Tourism Economy: Key Indicators (Data source: Unpublished HIS Global Insight data base; Note: Data is based upon 2016 City Administration boundaries)

Indicator	Finding (2018)	Observation
Total trips	4 276 211	The metropolitan area is South Africa's most important destination in terms of total trips.
Source of Trips	Domestic: 2 850 356 International: 1 425 855	Domestic trips account for two-thirds of total trips
Total Bednights	25.0 million	Johannesburg is South Africa's most important destination in terms of tourist bednights
Purpose of Visit (number of trips)	Leisure: 861 575 Business: 569 201 VFR: 2 520 301 Other: 325 134	In terms of trips by purpose of travel the largest is accounted for by VFR travel (58.9 percent). Leisure travel accounts for 20.1 percent of total trips and business 13.3 percent of total trips
Tourism contribution to local GDP	5.7 percent	The share of tourism to local GDP in Johannesburg is less than that recorded for South Africa as a whole (6.1 percent).

Table 5. Business Tourism Destinations of South Africa, 2018 (Data source: Unpublished HIS Global Insight data. Note: Data is based upon 2016 City Administration boundaries)

Location	Number of Business Trips	% of National Share
SOUTH AFRICA	3 967 870	100.0
Johannesburg	569 201	14.3
Tshwane	334 573	8.4
Cape Town	311 933	7.9
Polokwane	208 953	5.3
Ethekwini	197 148	5.0
Ekurhuleni	176 792	4.5
Mangaung	147 283	3.6

In details the findings reveal that visiting friends and relatives (VFR) is by far the most important purpose for a tourist trip to Johannesburg and accounts for nearly 60 percent of all visits. It should be understood that the vast majority of VFR travel into Johannesburg occurs in unpaid non-commercial forms of accommodation with visitors staying with friends and relatives. The commercial accommodation services economy of Johannesburg is therefore reliant essentially upon the market provided by flows of tourists to the city for leisure, business or other (mainly health and religion) purposes (Rogerson, 2018a). Finally, in terms of the overall contribution of tourism to the city's economy Table 4 shows that whilst the tourism sector makes an important contribution to the city's economy its share is less than the estimated share of tourism to national GDP. As is shown elsewhere Johannesburg has a diversified economic base which is dominated overall by the sectors of financial and business services (Rogerson & Rogerson, 2015). Although tourism places a vital role in Johannesburg's economy – particularly as a labour absorptive sector – in relation to job creation in the city the city cannot be characterised as having a tourism-led economy (Rogerson & Rogerson, 2017).

It has been shown that Johannesburg assumes a significant function in the global hierarchy of cities, most especially as a hub for the regional command and decision-

making headquarters of many large corporations (Rogerson & Rogerson, 2015). The city of Johannesburg functions as South Africa's commercial and financial core with the greatest concentration in the country of headquarter offices of major companies and correspondingly for the largest cluster of business services enterprises.

This means that as is shown on Table 5 Johannesburg continues to be by far South Africa's leading destination in terms of recorded business trips with 14.3 percent share of total trips. Johannesburg is a major destination for both formal and informal sector business travellers, the latter including a cohort of international cross-border shoppers (Rogerson & Rogerson, 2014; Rogerson, 2018).

Across sub-Saharan Africa as a whole, the two countries of Kenya and South Africa are the focal points for the reception of most assignees deployed to African operations of international companies and thus function as the most mature destinations for serviced apartments (The Apartment Service, 2018). In South Africa the serviced apartments sector has grown particularly since the nation's 1994 democratic transition. It has strengthened alongside other forms of accommodation services which operate as alternatives to traditional full-service hotels. A national audit conducted in 2015 revealed a total of 197 serviced apartment complexes, most of which are privately-owned (Greenberg & Rogerson, 2015). This total encompasses both a number of properties which are full dedicated serviced apartments as well as other 'hybrid' complexes which include permanent residential accommodation as well as commercial serviced apartments. This South African trend for hybrid developments of service apartments aligns with trends noted in many Asian cities for the construction of similar hybrid properties (Henderson & Smith, 2012). Within South Africa the two most important cities for the development of serviced apartments are shown to be Johannesburg and Cape Town (Greenberg & Rogerson, 2015, 2018).

Other less significant locations for such serviced apartments are Durban and Pretoria (Ueberroth & Rai, 2018). The discussion in the rest of this section narrows to explore the particular characteristics and workings of the serviced apartment sector in Johannesburg, South Africa's economic pulse. In terms of understanding the growth and activities of serviced apartments it is the city's role in formal business tourism economy of Africa as a whole and for South Africa in particular which is of major concern.

The Organization and Dynamics of Johannesburg's Serviced Apartment Sector

The Sandton area hosts the largest cluster of serviced apartments in Johannesburg as it is the financial core of the contemporary metropolitan area. The Sandton node emerged and prospered as a counter to the economic decline occurring of Johannesburg inner city which until the early 1990s was the financial hub of the South African economy. During the 1990s there occurred the accelerating demise of the CBD of Johannesburg with leading legal, financial and accounting firms, other business service enterprises and most importantly the Johannesburg Stock Exchange exiting the inner-city for the decentralized commercial office node of Sandton.

The Sandton CBD emerged as new financial capital of South Africa and for Southern Africa as a whole because of its cluster of headquarter office and command functions of major corporations – both international and domestic. The Sandton CBD and surrounds with its world class shopping centres and entertainment venues; central location in the metropolitan area, easy access to the Gautrain rapid train system with connections to O.R. Tambo International Airport became an attractive location for people to live and work. In addition, with increased levels of congestion in metropolitan Johannesburg as a whole it became the ideal location for the establishment of the largest cluster of executive service apartments in the city.

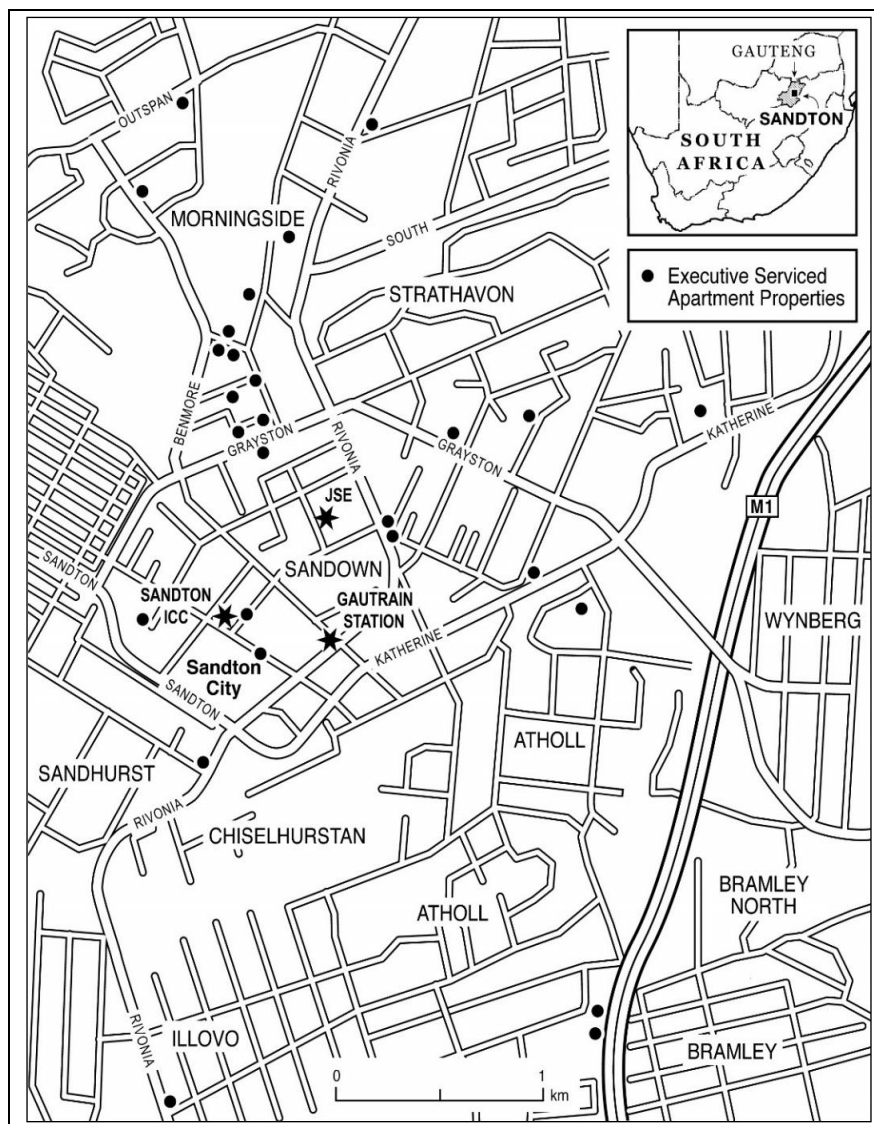


Figure 1. The Geography of Executive Serviced Apartments in Sandton

Figure 1 shows the geographical location of executive serviced apartment complexes in Sandton and reveals their proximity to the Sandton City shopping /entertainment centre, the Sandton International Convention Centre (ICC) and the Gautrain station with direct links to Pretoria, downtown Johannesburg and the international airport. A distinguishing feature of the South African serviced apartment sector is that most properties are in private ownership as opposed to branded properties linked to international hotel chains. In interviews it was revealed that some of the owners have between five and ten properties in the Sandton CBD, with many owning units within the same apartment block. In terms of the supply of such properties investors made property purchases from developers often on an off plan basis with the deliberate intention of renting them out to corporate clients. The market is maturing, however, and

large companies are beginning to penetrate the supply of executive apartments in the area. The Capital Hotel Group is the leading South African hospitality brand catering specifically for the business traveller. It offers a broad range of short, medium, and long-term accommodation to their blue chip and multi-national corporate clients this includes four properties in their Sandton portfolio. The stakeholder interviews revealed that the core market for executive apartments in Sandton is primarily the community of visiting international professionals/consultants who are in Johannesburg for short-term business assignments. The market is driven both by large South African corporates as well as by multinationals with their headquarter offices situated in the Sandton node.

In the view of one corporate rental specialist the concentration of South African corporate head-offices drives the demand for executive serviced apartments: "The big corporates like Sasol and Discovery need to have these available for their guys coming in from overseas" (Interview- Corporate Rental Specialist). With post-1994 South Africa's reintegration into the global economy there has been a substantial upturn in the number of visiting professionals and contract workers and especially of IT professionals. Confidentiality clauses did not always allow the corporates to disclose the nationalities of their visiting professionals. It was revealed, however, from interviews with the rental agents that a major market in Johannesburg (as much as half of the market according to some stakeholders) is for visiting business travellers from other countries in sub-Saharan Africa, in particular Nigeria. In addition to visiting professionals on short-term assignments and African business travellers it was revealed that other markets for serviced apartment complexes in Johannesburg are provided by African visitors to Johannesburg engaged on shopping trips or for purposes of health tourism. One respondent stated that amongst wealthy Africans: "We've had many people coming for pregnancies and ultimately the birth of their babies. It's very popular with guests from Mozambique, Zambia, Tanzania, and Zimbabwe. They arrive a month before the baby is due and stay for a few weeks after" (Interview – Rental Agent).

For their clientele, executive serviced apartments are steadily gaining popularity amongst the financial institutions with their visiting consultants. One financial property specialist explained that the decision by corporates to start using executive serviced apartments over hotel rooms was largely as a cost saving measure: "We compared the cost of renting a four-star hotel room in Sandton to a similar standard corporate apartment.

As a corporate, the hotels offer discounted rates on long-term stays at about R1 200 a night. You can't pay twelve hundred a night for a client who is coming for a month" (Interview- Financial Property Specialist, Sandton). From the perspective of the corporate clients there are multiple advantages of using executive apartments as opposed to the conventional full service hotel: "Before, the poor guy has to sit in a tiny hotel room, eating the same food at the same restaurant every day". The local rental agents made clear that the appeal of executive serviced apartments is linked to cost effectiveness as well as offering a home-like environment. One interviewee stated as follows: "It's definitely cheaper and great value for money. The apartments are fully furnished, with great finishes. They [Visiting professionals] have everything they could ever need.

They want to feel like they are at home and not stuck in a hotel environment" (Interview- Corporate Rental Agent, Sandton). The advantages of privacy and space are the main reasons for their choice of an apartment over a hotel room. A leading rental agent believes that clients prefer apartments as they can cook for themselves although they do occasionally eat out: "Clients like to feel that their space is their own. They can leave their things lying around and not have to worry about hotel staff interfering with their space" (Interview- Corporate Rental Specialist). For visiting professionals the most popular are four star quality graded establishments with visiting professionals. Cost considerations are

reflected in the preference for four as opposed to five star properties. In addition, it was revealed in interviews that whilst the number and frequency of business trips has increased, the overall duration of the business trips has declined in recent years. One relocation agent argued that this is a consequence of increasing budgetary restraints, and that work contracts are shorter as compared to earlier years: “The contractors have to work harder and quicker and get out. I don’t think the corporates can afford to bring these guys out on longer contracts at the moment” (Interview – Financial Property Specialist). In many respects these findings relating to increasing volume but shorter stays are a mirror of the international trends as reported by research produced by The Apartment Service (2018).

CONCLUSION

As the commercial lodging sector is an essential element of competitive tourism economies its changing character, organization and dynamics demands expanded attention from tourism scholars. Although some upturn in scholarship has been noted in recent years it has been mainly concentrated upon the hotel sector and most recently to considerations around the sharing economy. It is argued that serviced apartments are one emerging kind of lodging establishment that so far has attracted meagre attention from researchers both in the contexts of the global North and the global South. In the context of sub-Saharan Africa, South Africa’s leading cities are focal points for their appearance. Johannesburg’s executive self-serviced apartment economy is primarily concentrated in the upmarket decentralized commercial node of Sandton. The market for these properties is variable but arguably is dominated by international visiting professionals on short-term assignments to South Africa. Other clients are African business travellers, shoppers and wealthy Africans using Johannesburg’s excellent medical facilities. Overall, our findings contribute to the small extant body of tourism-focussed writings concerning the lodging sector in general as well as to one neglected niche of accommodation services which is expanding significantly in various parts of the world including major business centres in sub-Saharan Africa (Kinuthia, 2016; The Apartment Service, 2016; Tichaawa, 2017; Greenberg & Rogerson, 2018).

Acknowledgments

Thanks are offered to University of Johannesburg for financial support, to Wendy Job for producing the map and Skye Norfolk for important inputs.

REFERENCES

- Arvidsson, M. (2015). *Serviced Apartments in Sweden: Is There A Growth Opportunity?* Stockholm, Sweden: KTH Architecture and the Built Environment, Real Estate Management. MSc Thesis No. 364.
- Bao'er, Z., As& Chengqiang, Z. (2004). A Study of Current Status of the Development of Shanghai's Hotel-Style-Serviced-Apartments. *Tourism Tribune*, 19, 66-71.
- Beaverstock, J.V. (1996) Migration, Knowledge and Social Interaction: Expatriate Labour Within Investment Banks. *Area*, 28 (4), 459-470.
- Beaverstock, J.V. (2005). Transnational Elites in the City: British Highly-skilled Intercompany Transferees in New York City's Financial District. *Journal of Ethnic and Migration Studies*, 31 (2), 245-268.
- Beaverstock, J.V., Derudder, B., Faulconbridge, J.R., & Witlox, F. (2009). International Business Travel: Some Explorations. *Geografiska Annaler Series B*, 91, 193-202.
- Brooker, E. & Joppe, M. (2014). A Critical Review of Camping Research and Direction for Future Studies. *Journal of Vacation Marketing*, 20 (4), 335-351.
- Christie, I., Fernandes, E., Messerli, H. & Twining-Ward, L. (2013). *Tourism in Africa: Harnessing Tourism for Growth and Improved Livelihoods*. Washington DC: The World Bank.
- Deepekha, S.P. & Narayanan, M.K.B. (2018). Strategies Adopted by Serviced Apartments For Customer Attraction and Retention in Emerging Market. *International Journal of Pure and Applied Mathematics*, 118 (20), 759-769.
- Edghiem, F. & Mouzughy, Y. (2018). Knowledge-Advanced Innovative Behaviour: A Hospitality Service Perspective. *International Journal of Contemporary Hospitality Management*, 30 (1), 197-216.

- Foxley, S. (2001). Serviced Apartments in the UK: A Growth Sector? *Journal of Property Investment and Finance*, 19(1), 79–89.
- Geieregger, O., & Oehmichen, A. (2008). A Home for the Modern Nomad: Extended Stay Hotels. *Journal of Retail and Leisure Property*, 7(3), 216–233.
- Greenberg, D. & Rogerson, J.M. (2015). The Serviced Apartment Industry of South Africa: A New Phenomenon in Urban Tourism. *Urban Forum*, 26 (4), 467–482.
- Greenberg, D. & Rogerson, J.M. (2018). Accommodating Business Travellers: The Organisation and Spaces of Serviced Apartments in Cape Town, South Africa. *Bulletin of Geography: Socio-Economic Series*, 42, 83–97.
- Gursoy, D., Chi, O.H., Lu, L. & Nunkoo, R. (2019). Consumers Acceptance of Artificially Intelligent (AI) Device Use in Service Delivery. *International Journal of Information Management*, 49, 157–169.
- Guttentag, D. (2015). Airbnb: Disruptive Innovation and The Rise of an Informal Tourism Accommodation Sector. *Current Issues in Tourism*, 18 (12), 1192–1217.
- Guttentag, D. & Smith, S.L.J. (2017). Assessing Airbnb as a Disruptive Innovation Relative to Hotels: Substitution and Comparative Performance Expectations. *International Journal of Hospitality Management*, 64, 1–10.
- Guttentag, D., Smith, S., Potwarka, L. & Havitz, M. (2018). Why Tourists Choose Airbnb: A Motivation-Based Segmentation Study. *Journal of Travel Research*, 57 (3), 342–359.
- Hay, A. & Visser, G. (2014). Socio-Cultural and Socio-Economic Features of Second Homes in Rosendal, South Africa. *Bulletin of Geography: Socio-Economic Series*, 26, 157–166.
- Henderson, J.C. & Smith, R.A. (2012). Analysis of the Serviced Apartments Sector and Its Prospects in Southeast Asia. *Tourism Review International*, 15, 349–353.
- Hermelin, B. (2012). Global Networks on the Ground. In L. Smas (Ed.), *Hotel Spaces: Urban and Economic Geographical Perspectives on Hotels and Hotel Developments*. Stockholm: Stockholm University, 61–72.
- Hirsh, M. (2015). The Shifting Demographics of the Serviced Apartment Industry in South East Asia. *South East Asia Research*, 23(2), 187–204.
- Hong, S. & Zhenzhen, J. (2013). *SWOT Analysis for Shanghai's Serviced Apartment*. In Proceedings of the 2nd International Conference on Systems Engineering and Modeling (ICSEM-13). Paris: Atlantis Press.
- Idahosa, L. (2018). Environmental Sustainability and Tourism Accommodation in South Africa: The Managers' Perspective. *EuroEconomica*, 37 (2), 259–275.
- Kinuthia, K.J. (2016) *An Assessment of the Growth and the Performance of Serviced Apartments in Kenya: A Case Study of Kilimanjaro Area*. Nairobi: University of Nairobi, MA thesis (Valuation and Property Management).
- Kontogeorgopoulos, N., Churyen, A. & Dunangsaeng, V. (2015). Homestay Tourism and the Commercialization of the Rural Home in Thailand. *Asia Pacific Journal of Tourism Research*, 20 (1), 29–50.
- Köseoglu, M.A., Okumus, F., Putra, E.D., Yildiz, M. & Dogan, I.C. (2019) Conceptual Structure of Lodging-Context Studies: 1990–2016. *Journal of Hospitality & Tourism Research*. DOI.10.1177/1096348018823912.
- Magombo, A., Rogerson, C.M. & Rogerson, J.M. (2017) Accommodation Services for Competitive Tourism in sub-Saharan Africa: Historical Evidence from Malawi. *Bulletin of Geography: Socio-Economic Series*, 36, 73–92.
- Manning, C., de Roos, J., O'Neill J.W., Bloom, B., Agarwal, A. & Roulac, S. (2018). Hotel/Lodging Real Estate Industry Trends and Innovations. *Journal of Real Estate Literature*, 26 (1), 13–41.
- Martin J.C., Roman, C. & Mendoza, C. (2018). Determinants for Sun-and-Beach Self-Catering Accommodation Selection: A Stated Preference Approach. *Tourism Economics*, 24 (3), 319–336.
- Mazilu, M., Rabontu, C. & Marinescu, R. (2017). New Products and Strategies for Sustainable Tourism in Romania. *Journal of Tourism & Hospitality*, 6: 309 doi: 10.4172/2167-0269.1000309
- Morrison, A. (2018). Hospitality Research: Legacies and Futures. *Tourism Management Perspectives*, 25, 189–192.
- Mura, P. (2015). Perceptions of Authenticity in a Malaysian Homestay: A Narrative Analysis. *Tourism Management*, 51, 225–233.
- Novelli, M. (2015). *Tourism and Development in Sub-Saharan Africa*. Abingdon: Routledge.
- Oxford, T. (2019). Capital Hotels: Trailblazing the Apartment. *Mail and Guardian* (Johannesburg), 12 to 18 April, 5.
- Pandy, W. & Rogerson, C.M. (2013). The Timeshare Industry of Africa: A Study in Tourism Geography. *Bulletin of Geography: Socio-Economic Series*, 21, 97–109.
- Pandy, W. & Rogerson, C.M. (2014). The Making of the South African Timeshare Industry: Spatial Structure and Development Challenges. *Bulletin of Geography: Socio-Economic Series*, 26, 183–201.
- Phadungyath, P. (2008). *Factors Influencing the Selection of Serviced Apartments by Female Business Travellers*. Bangkok: Srinakharinwirot University MA Dissertation.
- Poon, K.P. (2005). *An Empirical Study of the Determinants of Serviced Apartment Rent in Hong Kong*. Hong Kong: University of Hong Kong Dissertation.
- Roberts, C. & Shea, L.J. (2017). A Theory of Lodging: Exploring Hotel Guest Behaviour. *Journal of Hospitality and Tourism Research*, 41, 389–392.
- Rogerson, C.M. (2015a). The Uneven Geography of Business Tourism in South Africa. *South African Geographical Journal*, 97 (2), 183–202.
- Rogerson, C.M. (2015b). Unpacking Business Tourism Mobilities in sub-Saharan Africa. *Current Issues in Tourism*, 18 (1) 44–56.

- Rogerson, C.M. (2018). Informal Sector City Tourism: Cross Border Shoppers in Johannesburg. *GeoJournal of Tourism and Geosites*, 22 (2), 372-387.
- Rogerson, C.M. (2019). Business Tourism Under Apartheid: The Historical Development of South Africa's Conference Industry. *Urbani izziv*, 30 (Supplement), 82-95.
- Rogerson, C.M. & Rogerson, J.M. (2014). Urban Tourism Destinations in South Africa: Divergent Trajectories 2001-2012. *Urbani izziv*, 25 (Supplement), S189-S203.
- Rogerson, C.M. & Rogerson, J.M. (2015). Johannesburg 2030: The Economic Contours of a 'Linking Global City'. *American Behavioural Scientist*, 59, 347-368
- Rogerson, C.M. & Rogerson, J.M. (2018). The Evolution of Hotels in Johannesburg 1890-1948: A Case of Historical Urban Tourism. *GeoJournal of Tourism and Geosites*, 23 (3), 738-747.
- Rogerson, C.M. & Rogerson, J.M. (2019). Tourism and Accommodation Services in South Africa: A Spatial Perspective. In: J. Knight & C.M. Rogerson (eds.), *The Geography of South Africa: Contemporary Changes and New Directions*, Cham: Springer International, 231-220.
- Rogerson, C.M., Hunt, H. & Rogerson, J.M. (2013). Safari Lodges and Local Economic Linkages in South Africa. *Africanus*, 43 (1), 3-17.
- Rogerson, J.M. (2010) The Boutique Hotel Industry in South Africa: Definition, Scope and Organisation. *Urban Forum*, 21, 425-439.
- Rogerson, J.M. (2011). The Limited Services Hotel in South Africa: The Growth of City Lodge. *Urban Forum*, 22, 343-361.
- Rogerson J.M. (2013a). Size Matters in the African Hotel Industry. *African Journal for Physical, Health Education, Recreation and Dance*, 19 (Supplement 2), 217-233.
- Rogerson J.M. (2013b). Reconfiguring South Africa's Hotel Industry 1990-2010: Structure, Segmentation, and Spatial Transformation. *Applied Geography*, 36, 59-68.
- Rogerson, J.M. (2013c). Market Segmentation and the Changing Budget Hotel Industry in South Africa. *Urbani izziv*, 24 (2), 112-123.
- Rogerson, J.M. (2013d). The Economic Geography of South Africa's Hotel Industry 1990 to 2010. *Urban Forum*, 24 (3), 425-446.
- Rogerson, J.M. (2014). Hotel Location in Africa's World Class City: The Case of Johannesburg, South Africa. *Bulletin of Geography: Socio-Economic Series*, 25, 181-196.
- Rogerson, J.M. (2018a). The Geography of Tourist Bednights in South Africa. *GeoJournal of Tourism and Geosites*, 23 (3), 835-847.
- Rogerson, J.M. (2018b). The Early Development of Hotels in Johannesburg ca. 1928-1963. *African Journal of Hospitality Tourism and Leisure*, 7 (4), 1-16.
- Shi, S., Gursoy, D. & Chen, L. (2019) Conceptualizing Home-share Lodging Experience and Its Impact on Destination Image Perception: A Mixed-Methods Approach. *Tourism Management*, 75, 245-256.
- Sood, J., Lynch, P. & Anastasiadou, C. (2017). Community Non-participation in Homestays in Kullu, Himachal Pradesh, India. *Tourism Management*, 60, 332-347.
- Stopforth, H. (2014). Interview, Owner of Ambassador Letting, Pretoria, 25 June.
- Tichaawa, T. (2017). Business Tourism in Africa: The Case of Cameroon. *Tourism Review International*, 21 (2), 181-192.
- Timothy, D. J., & Teye, V. B. (2009). *Tourism and the Lodging Sector*. London: Butterworth-Heinemann.
- Ueberroth, L. & Rai, S. (2018). A Different Model. *Business Traveller Africa*, April, 44.
- Vanichvatana, S. (2006). The Different Amenities Provided in Apartments and Serviced Apartments. *AU Journal of Management*, 4 (1), 53-65.
- Visser, G., Erasmus, I. & Miller, M. (2017). Airbnb: The Emergence of a New Accommodation Type in Cape Town, South Africa. *Tourism Review International*, 21 (2), 151-168.
- Walter, P. Regmi, K.D. & Khanal, P.J. (2018). Host Learning in Community-Based Ecotourism in Nepal: The Case of Sirubari and Ghalegaun Homestays. *Tourism Management Perspectives*, 26, 49-58
- Younes, E. & Kett, R. (2007). Hotel Investment Risk: What Are the Chances? *Journal of Retail and Leisure Property*, 6, 69-78.
- *** The Apartment Service (2013). *The Global Serviced Apartments Industry Report 2013/14*. London: The Apartment Service.
- *** The Apartment Service (2015). *The Global Serviced Apartments Industry Report 2015/16*. London: The Apartment Service.
- *** The Apartment Service (2016). *The Global Serviced Apartments Industry Report 2016/17*. London: The Apartment Service.
- *** The Apartment Service (2018). *The Global Serviced Apartments Industry Report 2018/19*. London: The Apartment Service.

Submitted:
08.06.2019

Revised:
08.09.2019

Accepted and published online
11.10.2019

THE RISE OF TRAIL RUNNING IN SOUTH AFRICA: POSSIBILITIES FOR SMALL-SCALE SPORTS TOURISM

Tracey McKAY*

Department of Environmental Science, University of South Africa,
Preller St, Muckleneuk, Pretoria, 0002, Africa de Sud, e-mail: mckaytjm@unisa.ac.za

Lynsey McEWAN

Gordon Institute of Business Studies, University of Pretoria,
Lynnwood Rd, Hatfield, Pretoria, 0002, Africa de Sud, e-mail: lynseymcewan@gmail.com

Melissa BAKER

Department of Environmental Science, University of South Africa,
Preller St, Muckleneuk, Pretoria, 0002, Africa de Sud, e-mail: Bakermisp@unisa.ac.za

Citation: McKay T., McEwan L., & Baker M. (2019). THE RISE OF TRAIL RUNNING IN SOUTH AFRICA: POSSIBILITIES FOR SMALL-SCALE SPORTS TOURISM. GeoJournal of Tourism and Geosites, 26(3), 930–942. <https://doi.org/10.30892/gtg.26320-408>

Abstract: Between 2011 and 2016, South Africa witnessed a threefold increase in the number of official trail running events. Given South Africa's historical love affair with ultra-long-distance road running, and with health and physical activity becoming increasingly important, such growth is not surprising. This growth reflects international sports trends, with trail running one of the fastest growing segments of this industry. It is argued here that trail running tourism has major growth potential in South Africa, as trail runners are prepared to travel to 'destination' race events. Such events can boost the local tourism economy, attracting domestic and international tourists. Locations in South Africa that have natural physical beauty, are scenic, remote or off the usual tourism track could leverage their physical assets to attract participants to 'destination trail running events'. To that end, this study explores the local trail running market by firstly investigating some of South Africa's iconic long-distance trail running events, and, secondly, profiling trail running tourists and investigating their spending behaviour. As research on the nature of active sports tourism and the characterisation of the South African market for iconic destination trail running events is limited, the study fills an important gap in the literature.

Keywords: trail running, South Africa, destination marketing, sport tourism, local economic development,

* * * * *

INTRODUCTION

It has been argued by Nyikana and Tichaawa (2018, 1) that sport tourism can make a significant contribution to local economic development in Africa. In particular, they

* Corresponding author

maintain that “sport tourism events can be used to promote previously neglected and underdeveloped destinations”. In particular Hemmonsbeey and Tichaawa (2019, 254) feel that non-mega events, of which running events would be one, hold particular opportunities for “establishing tighter social networks and connections” to the local community. Thus, such events should be encouraged by local governments as a way of stimulating the local economy. With respect to running, South Africa is home to two globally famous long-distance road-running events, namely: The Comrades Marathon and Two Oceans Marathon. Both these events attract tens of thousands of running tourists, including many international competitors, with positive economic impacts on the provinces of Kwa-Zulu Natal and the Western Cape respectively (Saayman & Saayman, 2012; Fairer-Wessels, 2013; Maharajh, 2015). However, the focus on these events has resulted in a neglect of other smaller, non-mega running events. Events that, we argue here, have the potential to grow local economies in precisely the way Nyikana and Tichaawa (2018) and Hemmonsbeey and Tichaawa (2019) envisage. In particular, off-road or trail running has grown enormously in popularity with a proliferation of trail running events across South Africa in recent years (Christie, 2016). Despite this, the size of the South African domestic tourism market for destination trail running events has not been reported on. Thus, the purpose of this study is to explore the South African long-distance trail running community through the lens of sport tourism. In this regard, we deemed long distance running races as events which are 21km or more in length.

The study establishes who the typical trail runner is, and argues that it contributes to local economies as a type of niche sporting tourism. The paper posits that hosting long distance trail running events can help boost both domestic and international tourism in South Africa, thus assisting this key economic sector to grow (Visser & Rogerson, 2014; Alexandris, 2016). This is crucial as, currently, South Africa’s tourism sector is struggling. For example, decline in both international arrivals and domestic travellers. As a result, the total number of day trips in South Africa have decreased from 48 million in 2014 to 47 million in 2017, and overnight trips from 47 million in 2014 to 44 million for the same period (StatsSA, 2017; 2018). Even worse is that StatsSA (2019) reports that foreign arrivals were lower for Quarter One 2019 than for the same quarter in 2017. Thus, being able to leverage the trail running market to generate local economic growth is a distinct possibility for South Africa, especially for small towns in remote areas.

Sport Tourism

Globally sport tourism is one of the fastest growing types of niche tourism; although the definition and scope of sport tourism is greatly debated (Deery et al., 2004; Gibson, 2004). A broad definition includes event tourism, along with competitive and recreational sporting activities. Gibson (2005, 134) defines sport tourism as “leisure-based travel that takes individuals temporarily outside of their home communities to participate in physical activities, to watch physical activities, or to venerate attractions associated with physical activities”. This broad definition includes many different types of tourists, from those travelling to attend a Roland-Garros tennis match to those playing golf whilst on holiday. Thus, researchers have defined several subcategories of sport tourism. These include: (1) Event sport tourism, which is travel as a spectator to an organized sport event, such as include to attend a Soccer World Cup match; (2) Nostalgia sport tourism, which is travel for sport-related purposes such as to visit sports stadiums or museums; (3) Integral sport tourism, travel for activities where “sport and the tourism are part and parcel of the same experience” (Sugden, 2007, 236); and (4) Active sport tourism, travel to spectate or participate in leisure sporting activities; such as travel to undertake a mountain biking trail (Gibson, 2005). Many of these sub-categories do overlap, which makes the precise study of the phenomenon a challenging task (Jago et al., 2003). As

this research focuses on travelling to participate in a trail running event, it falls into the active sport tourism category. It is, then, to trail running that this paper will now turn.

The rise of trail running

Globally, the popularity of trail running is rising. In an effort to understand this phenomenon, researchers across the Global North and South have begun to investigate it (Navalta et al., 2018). Despite this, scholarly research into trail running remains in its infancy (Havlick et al., 2016; Urbaneja & Farias, 2018). One important theme that has emerged in the (sparse) literature are the environmental impacts of trail running. Havlick et al. (2016) argue that trail running (along with hiking and mountain biking) has a negative impact on the biophysical environment, despite the activity being promoted as 'sustainable'. As a result, Ng et al. (2017) argue that trail running in protected areas should be regulated. This includes limiting the number of events and participants. In addition, the growth in the sheer number of trails is such that they can become a threat to public recreational space (Newsome & Davies, 2009; Ballantyne et al., 2014; Barros & Pickering, 2015). Thus, there have been calls to conduct research on the ecological impacts of trail running, as well as into user conflicts between trail runners and those who use public recreational space for other activities such as walking, cycling, or dog walking (Moore, 2007; Newsome, 2014). Another research theme arising in relation to trail running is that of climate change. Importantly, some European skiing resorts are adopting trail running as a means to diversify their product offerings and pursue new markets as they can no longer guarantee snowfall (Richard et al., 2010).

Other emerging areas of research include the local economic impacts of trail running events and the demographic characteristics of participants (Hoffman & Wegelin, 2009; Wicker & Hallman, 2013; Soler-Vayá & González, 2017; Navalta et al., 2018; Urbaneja & Farias, 2018). Some scholars focus on the intrinsic (push) and extrinsic (pull) factors to determine what drives participants to travel to participate in such running events (Lough et al., 2016; Aicher & Newland, 2017). Tourism researchers have also looked at the potential of promoting trail running as a niche sport tourism market (Perrin-Malterre & Chanteloup, 2018). In this regard Newland & Aicher (2018) argue that host communities seeking to attract new tourists to their destination should focus on identifying moderate-distance running events, as these seem to attract the most runners.

Research has also been conducted on what factors are driving the growth of trail running, such as the adoption of a 'fitness culture' and the rise of social media - which together have created a reason and a means to promote trail running. A study by Boudreau & Giorgi (2010) found that trail running helps to reduce job stress and improve work-productivity. The study recorded important psychological benefits associated with trail running such as increased self-efficacy, greater discipline, more mental focus on career goals, a more positive attitude to life, enhanced work performance, increased problem-solving, improved time management, and better organization skills.

A noticeable trend in trail running is an increasing rate of female participation (Hoffman & Wegelin, 2009; Navalta et al., 2018). For example, female participation in the 100-mile North American Moab Trail race went from 12 percent of the field in 1986 to 22 percent in 2007. Between 2012 and 2015 on the 21km route (of the same race) there was also an increase in the number of female participants. According to Running USA (2007), female runners increased from (on average) 11 percent of the field in 1980 to 40 percent in 2007. The increase is such, that a renowned roadrunner Grete Waitz, attributed the growing popularity of marathons as a whole to this increase in the number of female participants (Kislevitz, 1999). Navalta et al. (2018) suggest social changes, such as women gaining equal rights and a drive for female empowerment, may be encouraging women to enter such events, as well as to make use of public spaces for recreational purposes

(Wesely & Gaarder, 2004). The social nature of participating in a trail race and increasing levels of personal safety may also be creating the conditions that, then, enable women to undertake such events in ever greater numbers. Choate (2008) asserts that female runners benefit from participation in terms of feeling increased self-confidence, being more outgoing (overcoming shyness), and gaining relief from depression. Despite such research, the profile of the South African trail running participant remains unknown.

Sports Tourism Research in South Africa

Given South Africa's natural beauty and the generally hospitable climate, outdoor sport is a popular pastime. But as a field of academic inquiry, sports tourism is still in its infancy in South Africa (Tassiopoulos & Haydam, 2008). Part of this is due to the role sport played in both fostering, and fighting, the apartheid regime. For example, on the one hand, the apartheid government segregated sport along racial lines; while on the other hand, the anti-apartheid movement harnessed sport as a platform for resistance against apartheid. This included imposing sporting sanctions on South Africa (Keech & Houlihan, 1999). Thus, for a long time sport was highly politicized in South Africa.

Consequently, sport and sport tourism in South Africa has a unique narrative in comparison to the experiences of the Global North. In particular, a lack of critical research within the niche market of sport tourism was evident during the apartheid years. In line with changes in the political environment of South Africa post 1990, research on sport tourism strengthened once the sport boycott ended (Visser & Hoorgendoorn, 2011). Thus, sport tourism "has emerged as one of the fastest-growing spheres of the leisure travel market and has become a subject of interest at academic and governmental levels alike" (Kotze & Visser, 2008, 61). Crucially, the pace and trajectory of sport tourism research has been strongly influenced by post-apartheid policies. In 1995, the State identified sport tourism as a strategic tool to stimulate economic development and social regeneration (Swart & Bob, 2007). Subsequently, the 1996 Tourism White Paper highlighted sports tourism as a vehicle for development. In addition, a State initiated sport tourism campaign, known as 'South African Sports Tourism' (SAST), was launched in 1997 with the aim of developing the potential of this niche tourism sector (Ritchie & Adair, 2002). Thus, along with many other countries, South Africa highlighted sport tourism as a means to attract international tourists (Gibson, 2005). Unfortunately, research suggests a mismatch between policy and implementation. Swart (2005) asserts that since SAST's launch, no tangible progress has been made, and to date, the initiative remains inactive. Worse is that the Tourism Growth Strategy (released in 2002) seems to have dropped sport tourism as a primary driver for development. This trend of neglect continued with the 2004-2007 Domestic Tourism Growth Strategy (DEAT, 2004). This decline in government support is reflected in the findings of the Global Competitiveness Project (Department of Environmental Affairs and Tourism, 2004). Results of this Global Competitiveness Project reveal that demand for sports tourism, amongst both international and domestic tourists, is weak. Thus, this niche market needs much attention in terms of marketing (Tassiopoulos & Haydam, 2008).

From a South African research perspective, prior to 2008, sport tourism studies focused on supply-side issues such as improvement of sport performance and the marketing of sports offerings (Tassiopoulos & Haydam, 2008). Another major focus of research was South Africa's involvement in Sport-Mega Events (SME) (Cornelissen, 2005; 2011). Thus, research into SMEs, such as the FIFA Soccer World Cup, Rugby and Cricket World Cups, has been extensive (Giampiccoli et al., 2015). Much attention has been paid to the economic and social impacts on host communities of SMEs, especially pertaining to employment creation, poverty reduction, local economic development, small enterprise creation, and post-event impacts (Swart et al., 2008; Rogerson, 2009;

Hemmonsby and Tichaawa, 2018). In that regard, Bama and Tichaawa (2012) have taken this further by analysing the environmental citizenship and sustainability of major sporting events. Other studies in sports tourism in South Africa include mountain biking, road running, golf tourism, and cycling (Kotze, 2006; Kotze & Visser, 2008; Du Preez & Lee, 2015). Assessing the viability of recurring sporting events of a local nature has also become popular, with studies by Turco et al (2003) which focused on the socio-economic impact of sport tourism events such as the Comrades Marathon, the Investec Cycling Tour, and the Vodacom Beach Africa festival on the City of Durban. Others have followed suit, with Kotze (2006) assessing the economic impact of the Two Oceans Marathon; Saayman et al. (2008) investigating the economic impact of visitor spending during the Cape Argus Cycle Tour; and Saayman and Saayman (2012) examining determinates for visitor spending at three major sport events in South Africa.

A call to investigate the sustainability and socio-economic impacts of hosting a recurring local sport event was answered by Giampiccoli et al. (2015), who found that over a five-year period, hosting the Comrades Marathon, the Dusi Canoe Marathon and the Midmar Mile generated approximately the same economic impact for Kwa-Zulu Natal as the once off 2010 FIFA World Cup. Their study has been supported by the work of Saayman and Saayman (2012) who estimated that the 2011 Comrades Marathon generated a total direct spending of approximately R76 million for KwaZulu-Natal. While Maharajh (2015) similarly estimated that the 2010 Comrades Marathon race generated in excess of R130 million for the cities of Durban and Pietermaritzburg. This suggests that recurring local or regional events are more sustainable, less expensive, and have a significantly greater, positive, long-term local economic impact than SMEs (Daniels and Norman, 2003; Gibson et al., 2003, Gibson et al., 2012; Giampiccoli et al., 2015). In this regard, Kotze and Visser (2008) concluded that South Africa should work to promote one-day local sporting events. In line with Kotze and Visser (2008), Daniels and Norman (2003) suggest smaller-scale events generate revenue for the local economy, create a sense of comradeship and pride amongst locals, as well as increasing awareness of the host as a tourist destination. Green and Chalip (1998) found that sport tourists use events as opportunities to socialise and celebrate the particular sporting subculture.

In this way, travel associated with sport has become a way to create personal identity and participate in authentic experiences (Moularde & Weaver, 2016). The greater the attachment to a particular sporting personal identity, the more likely the individual is to undertake sports related travel, creating a virtuous economic and social circle. This is especially true for long-distance runners, for example. McGehee et al. (2003) found that highly involved roadrunners made many overnight trips with the purpose of participating in running events. Accordingly, Ogles and Masters (2003) suggest that long-distance running tourism has particularly high tourism potential (due to the high levels of personal commitment required). From a social perspective, a number of studies have shown that long-distance runners find that the activity promotes a sense of personal achievement and heightens self-esteem (Bond & Batey, 2005). In terms of the Comrades Marathon, it was found that achievement, commitment, and socialisation were the key motives for participation (Kruger & Saayman, 2013). If this is the case, then it is highly likely that long-distance trail running events may also have the same potential as a source of both ardent domestic and international tourists. However, Kruger and Saayman (2013) concluded that the motives for participation differ per sporting event. Therefore, participants should not be treated as a homogenous group for the purposes of event design and marketing. Thus, if local trail running destination events are to be promoted, a detailed knowledge of who the trail running tourist is, and what the potential economic size of the demand market is, is necessary.

MATERIALS AND METHODS

An exploratory design, case study approach, and quantitative survey methodology was adopted for this study (Saunders & Lewis, 2012). The study focusses on six one day long-distance trail running events in South Africa that were designated as iconic events due to their long history or status within the trail running community. The six events were: (a) The SkyRun; (b) The Ultra Trail Cape Town; (c) The Rhodes Run; (d) The Otter African Trail Run; (e) The Peninsula Ultra fun run (PUFfer), and (f) The Hobbit trail run. The survey sought to profile the trail runners who had participated in these events, or wanted to, as well as determine their spending behaviour with respect to long-distance trail running destination events (and the sport in general). An online Facebook survey amongst trail runners was undertaken. In particular, two Facebook community groups dedicated to long-distance trail running in South Africa were targeted, namely: “#TeamTrail #LoveTrail” and “South Africa Trail Running”¹. Permission from the relevant Facebook group admins was granted. The Facebook survey was piloted with eight self-identified long-distance trail runners. The results were analysed using SPSS. In order to mitigate the risk of a homogenous sample of only active Facebook users, respondents were asked to share the online survey amongst their other long-distance trail running friends and networks. Thus, snowball sampling was used to increase the sample size.

The total number of respondents to the survey was 118. Due to the purposive convenience sampling method and the online nature of the surveys used, the findings may not be statistically representative of the population. In order to strengthen the validity of the data, the online survey data was compared to that of runners who participated in the 2017 Ultra Trail Cape Town event, using data provided by the event organisers². It was found that much of the demographic findings between the online Facebook survey and the data provided by Ultra Trail Cape Town are in alignment. It should also be noted that the study did not include multi-day stage trail running events in order to limit the scope.

RESULTS

South Africa is home several iconic long-distance trail runs, namely: (a) The 52km Rhodes Run (established 1989); (b) The SkyRun (established 1991/2); (c) The 80km Peninsula Ultra fun run (PUFfer) (established 1995) (d) The Hobbit trail run (established 2006) and (e) The 44km Otter African Trail Run (established 2008). Most, however, have a small field. For example, in 2017, the SkyRun had only 339 participants across all three events (100km, 65km and 42km), the Rhodes Run had only 228 participants, while the Otter African Trail Run is always capped at 250 entrants per year. Similarly small is the Hobbit trail run with two categories, a 90km and a 38km, with an approximate total field of 200. New long-distance trail running destination events are also small, such as the Karkloof100 and the 53km Whale of Trail in the Western Cape. The Karkloof100 has two categories: a 100-mile (160km) and a 50 mile (80 km) category. It is a very small event with less than 100 people. Similarly, the Whale of Trail event comprises under 120 participants. This makes the new Ultra Trail Cape Town (established 2013) very different as it attracted over 1000 participants in 2017. Figure 1 presents the geographical distribution of these iconic events, with all of them hosted in just three provinces, namely the Western Cape, The Eastern Cape and KwaZulu-Natal. Notable is the dominance of coastal provinces in the provision of these races, as well as their geographical relationship with significant transport routes. Thus, access to locations is an important consideration that race event organisers have to take into account when considering hosting such an event.

¹ #TeamTrail #LoveTrail with 918 members as of 12 July 2017, found at <https://www.facebook.com/groups/teamtrail.lovetrail/> and South Africa Trail Running with 1720 members as of 12 July 2017, found at <https://www.facebook.com/groups/SATrailRunning/>

² See <https://www.ultratrailcapetown.com/> [Accessed 3 May 2018].

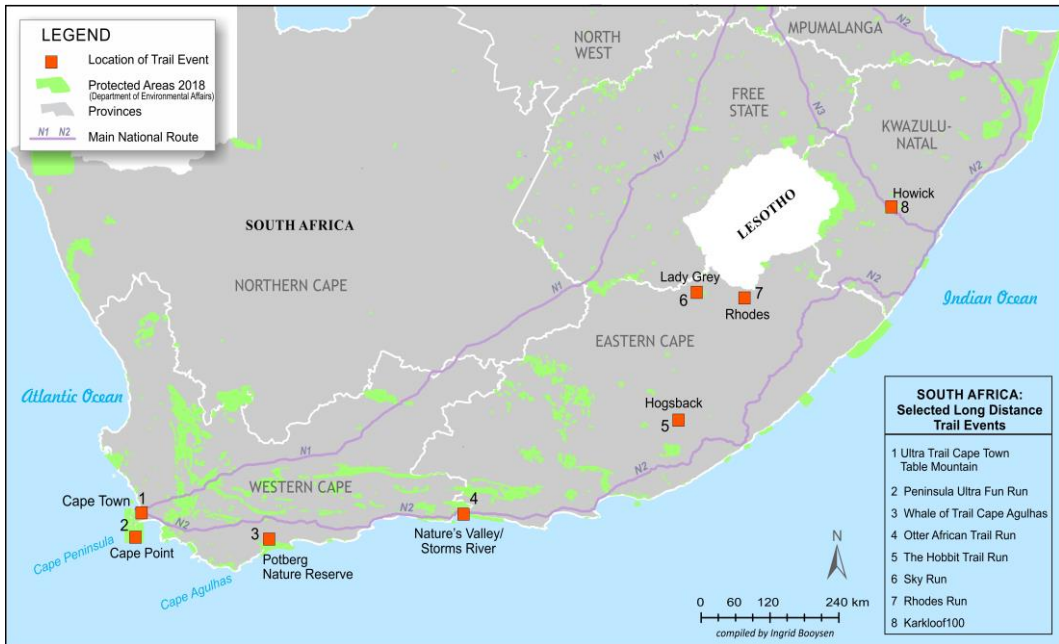


Figure 1. Distribution of iconic long-distance trail races across South Africa

Compared to most iconic long-distance trail running events, the Ultra Trail Cape Town, which takes place over and near Table Mountain, is a ‘mega’ event in trail running terms, attracting 1019 runners in 2017 from over 40 countries. There were 176 participants on the 100km route, 324 on the 65km route and 519 participating in the 35km event. The event formed part of the Ultra Trail World Tour. Of the participants in the 100km event, only 2% were Black African, 15% were female. The bulk (60%) were aged between 30 and 39 (average age 37 years). Thus, the vast majority of participants were young white men. Half (50%) were South African. Half (50%) were international tourists and 30% were domestic tourists. The remaining 20% were from Cape Town itself.

Only 70 percent of starters completed the 100km event. Of the participants in the 65km event, only 2% were Black African, 21% were female and the bulk (40%) were aged between 30 and 39 (average age 38 years). Thus, although white men still dominated, this distance category attracted more females. Most participants (62%) were South African, with 38% international tourists. Of the South African’s 22% had travelled to Cape Town for the event. Almost all (91%) starters completed the event. Of the participants in the 35km event, only 3% were Black African, 39% were female and 42% were aged between 30 and 39 (average age 37 years). Most participants (82%) were South African, 18% were international tourists. As for the 65km event, some 22% of the South Africans had travelled to Cape Town to participate in the event. Completion rates for the 35km event were high, with 94 percent of starters finishing the event. Thus, a typical participant was white, male, a domestic tourist and 37 years of age. Race completion and female participation rates increase as distance decreases. However, participation by groups other than white men was extremely low. In terms of the online Facebook survey of trail runners, the largest proportion (42%) of the respondents were between 30 and 39 years of age. In terms of race, the overwhelming majority (95%) were white. In terms of highest level of education, 54% of respondents held a postgraduate degree. These high education levels were consistent with the high-income profile in which: 26% fell in the highest income bracket, with a household income of over R1

000 000 per annum³; however, the largest portion of respondents (28%) had a pre-tax annual household income of R201 000 - R400 000. Regarding job description, 54% of the respondents worked as professionals, and 32% worked in managerial or technical roles. The findings indicate that the activity is a typically high-income domain.

Table 1. Long-distance trail running profile of respondents (Data source: Facebook survey, 2017)

Level of experience as a trail runner?	
Beginner 14 (12%)	Intermediate 55 (47%)
Experienced 39 (33%)	Advanced 10 (8%)
Years of involvement in trail running?	
Less than one year 10 (9%)	One to two years 26 (22%)
Three to four years 36 (31%)	Five to six years 24 (20%)
Seven to eight years 10 (9%)	More than nine years 12 (10%)
How many trail running events do you take part in (average per year)?	
None 1 (1%)	One or two 12 (10%)
Three or four 30 (25%)	Five or six 29 (25%)
Seven or eight 14 (12%)	Nine or more 32 (27%)
Number of times you travel more than 100km to a trail running event per year	
Zero 11 (9%)	Once or twice 54 (46%)
Three or four times 32 (27%)	Five or six times 13 (11%)
More than seven 8 (7%)	
Estimated trail running mileage in the last 12 months?	
Under 100km 16 (14%)	100 – 299km 28 (24%)
300 – 499km 27 (23%)	500 – 699km 14 (12%)
More than 700km 33 (28%)	

Table 1 details the long-distance trail running behaviour of the respondents. Most respondents rated their level of trail running experience as intermediate (47%) or experienced (33%); while many have been involved in the sport for three to four years (31%). Respondents spend a large amount of time engaging in the activity, with some 28% estimating their trail running mileage for the last year to be greater than 700km. In terms of event behaviour, the respondents are active in events: 27% took part in more than nine race events per year. Additionally, a large majority (73%) have taken part in an event longer than 21km in the past year. Regarding travel to destination events, 46% have travelled further than 100km on one or two occasions to take part in an event in the last year, while only 9% of respondents have not travelled to do so. When it came to iconic events, most respondents had taken part in at least one of the six designated iconic events, while 15% had taken part in two or more of the different events. As illustrated in Figure 2, the most popular event for the respondents was the Otter African Trail Run, followed by the SkyRun and then the new Ultra Trail Cape Town. Spending patterns of respondents on their long-distance trail running activities are given in Table 2. The largest contributors to the total spend were shoes (average of R2 513) and event entries (average of R2 424) (Table 2). Followed by transport to events (average of R2 322) and accommodation (R2 165). That said, the bulk of respondents spent less than R2 999 per annum on event entries and less than R1999 on shoes (38%). Such a low average spend on shoes means that most are likely only buying one pair a year, as they are costly specialist items. Respondents typically spent less on apparel, with the majority of 37% spending between R1 000 and R1 999 annually. In terms of total spend; the average was R11 373 per person per year. The study did not ask participants to quantify what they spend on food and race related items, however, as depicted in Figure 3, race related items such as drinks and snacks are costly.

³ In November 2017 the ZAR to USD exchange rate was R13 to one USD.

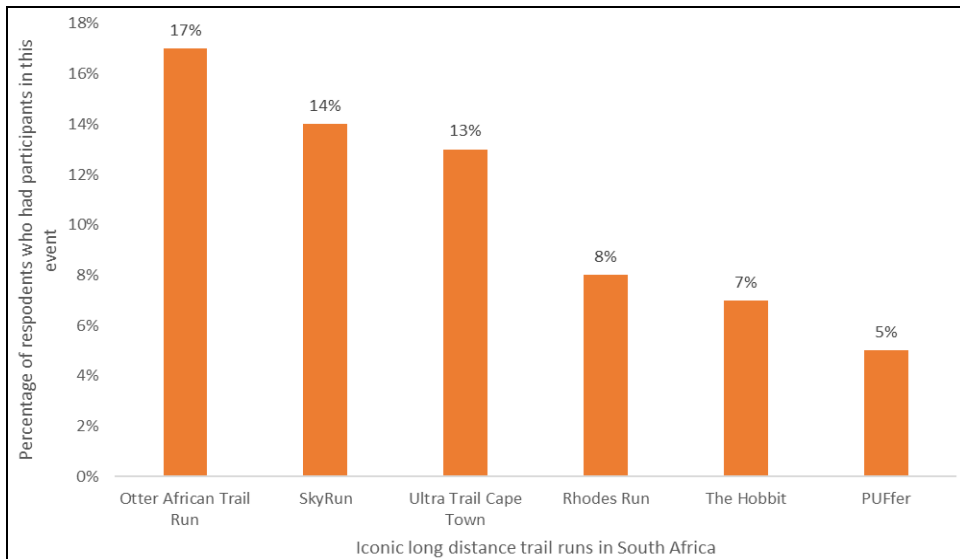


Figure 2. Respondent participation in iconic events

Table 2. Spending patterns of respondents on their long-distance trail running activities
(Data source: Facebook survey, 2017)

Spend Category	Less than R1000	R1000 - R1999	R2000 - R2999	R3000 - R3999	R4000 - R4999	More than R5000	Avg
Event Entries	22%	19%	32%	9%	8%	12%	R2 424 (21%)
Shoes	3%	38%	32%	10%	9%	8%	R2 513 (22%)
Apparel	25%	37%	18%	9%	3%	7%	R1 949 (17%)
Transport	14%	34%	30%	7%	8%	9%	R2 322 (20%)
Accommodation	26%	19%	31%	13%	5%	6%	R2 165 (19%)

Events, and accommodation at events, tended to be, on average, the costliest for many respondents. Figure 4 indicates what respondents said would be the maximum amount of money they are willing to spend on an event (if it included tented accommodation). The largest portion of respondents (36%) were willing to spend a maximum of R3 000, while 23% would spend R5 000 and 10% indicated they would spend R10 000 or more. This is a substantial amount of money. Thus, their engagement with sport tourism made up a substantial portion of the total annual average spend.

DISCUSSION

The study has demonstrated that there has been a rise in the number of high profile long-distance trail running destination events in South Africa in recent years. What is also clear is that there is demand for such events, with many 'repeat clients' (the same runners entering the same race every year) as some 27% of online respondents said they take part in more than nine events in any single calendar year. As the iconic trail events are both small in number and (most) have a small field, it is likely that demand for this kind of sports tourism remains unmet. The popularity of the new Ultra Trail Cape Town is also an indication thereof. In addition, while participation levels for black people and women are currently low, it is also highly likely that this will change over time, such that eventually

the demographics of trail running will come to resemble that of long-distance road running in South Africa. Thus, demand for these kind of events is likely to grow, in line with the general growth trajectory seen in road running in South Africa (Mandla Radebe, pers comm, 2018). Furthermore, the study has shown that trail runners have high levels of disposable income, which enables them to spend money on their sport.



Figure 3. Race day supplies, photograph taken a few days ahead of the 2018 Karkloof 100 event. Estimated cost R500 (Source: Hanno Langenhoven, 2018)

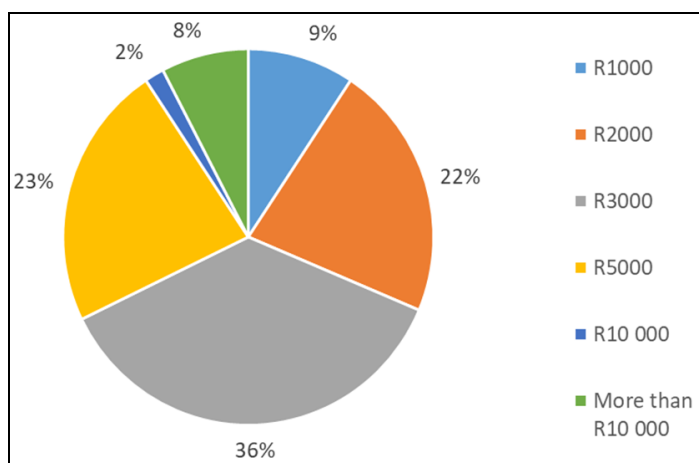


Figure 4. Maximum willing to spend on an event including tented accommodation

For example, respondents to the online survey reported spending substantial sums of money on trail running related equipment and events. While trail running events and equipment are costly, which may explain the high spend, it is also highly likely that people are willing to make sacrifices in other areas of their life to re-direct funds to this particular sports activity. For example, many are willing to travel to participate in such events and are not shy to purchase shoes, apparel and race-related foodstuffs. It is also highly possible that their actual spend was underreported (such as for shoes and race related foodstuffs) and so these spending estimates are conservative. Taking event entries, travel and accommodation purchases as an indication, it is highly likely that hosting such events

can boost local economies, in the same way other recurring sports events have, and South African tourism in general. Taking into account international trends and findings with respect to trail running, it is argued here that the rural, 'rugged' nature of the Eastern Cape Province, for example, is an ideal location to grow such tourism in South Africa. Thus, small Eastern Cape towns that have the necessary physical resources such as mountains, rivers, a coastline or open veld could, in conjunction with the trail running community (and event organisers), opt to host such an event (McKay, 2017).

However, as there are concerns about the possible negative impacts of trail running on the biophysical environment, it is recommended that the number of events should be increased, rather than increasing the number of participants per event. Trail events also need to have a range of distances to attract the best overall mix of participants in terms of domestic and international tourists and in terms of male and female runners. In particular, international tourists will only travel for seriously long distances (over 65km) but having exclusively long distances (more than 21kms) will preclude female runners. Thus, a combination of longer and shorter distances within one event is recommended. In this way, this form of sport tourism may be able to grow in a sustainable manner.

CONCLUSION

The recent increase in the number of long-distance trail running events and participants is an indication that trail running has major growth potential in South Africa. Importantly, the willingness of trail runners to spend money on event entries, transport and accommodation is an indication that if South Africa were to leverage its physical potential to host such events, the tourist economy as a whole may benefit. As the trail running community is attracted to destination events, both domestic and international tourists can be attracted to localities, especially the neglected or 'off the beaten track' ones, such as the Eastern Cape province of South Africa. Crucially, small towns located in areas with natural physical beauty should consider developing, marketing, and hosting such events as hosting such a recurring local sport event could have significant long-term benefits for local communities.

Acknowledgements

The authors would like to thank the participants in the online survey, as well as the organisers of the Ultra Trail Cape Town event for access to their data. A special thanks to Milton Milaras for language editing and critical review, and to Ingrid Booysen for the cartographic material. We are also most grateful to the critical reviewers for their insightful comments. Errors and omissions are our own.

REFERENCES

- Aicher, T. J., & Newland, B. L. (2017). To explore or race? Examining endurance athletes' destination event choices. *Journal of Vacation Marketing*, 29(3) <https://doi.org/10.1177/1356766717736364>.
- Alexandris, K. (2016). Testing the role of sport event personality on the development of event involvement and loyalty. *International Journal of Event and Festival Management*, 7(1), 2–20. <https://doi.org/10.1108/IJEFM-10-2015-0041>.
- Ballantyne, M., Gudes, O., & Pickering C.M. (2014). Recreational trails are an important cause of fragmentation in endangered urban forests: A case-study from Australia. *Landscape and Urban Planning*, 130, 112–124.
- Bama, H.K.N., & Tichaawa, T.M. (2015). Major sporting events and responsible tourism: Analysis of the 2013 Africa Cup of Nations (AFCON) tournament in Port Elizabeth, South Africa. *African Journal for Physical, Health Education, Recreation and Dance*, Supplement 1 (December), 205–219.
- Barros, A., & Pickering, C.M. (2015). Impacts of experimental trampling by hikers and pack animals on a high-altitude alpine sedge meadow in the Andes. *Plant Ecology & Diversity*, 8, 265–276.
- Bond, K. A., & Batey, J. (2005). Running for their lives: A qualitative analysis of the exercise experience of female recreational runners. *Women in Sport and Physical Activity Journal*, 14(2), 69–82.
- Boudreau, A. L., & Giorgi, B. (2010). The experience of self-discovery and mental change in female novice athletes in connection to marathon running. *Journal of Phenomenological Psychology*, 41(2), 234–267.

- Choate, M. (2008). *Marathon participation: A study of motivation and training habits of running affiliated with a charitable cause*. (Doctoral dissertation in Sports Management). United States Sports Academy, Retrieved from ProQuest Dissertations and Theses database. (ATT 3329383).
- Christie, S. (2016, July). The business of trail running. *Finweek*, 34–36. <https://www.fin24.com/Finweek/Featured/the-business-of-trail-running-20160718> [Accessed 13 Sept 2018].
- Daniels, M. J., & Norman, W. C. (2003). Estimating the economic impacts of seven regular sport tourism events. *Journal of Sport Tourism*, 8(4), 214–222.
- Deery, M., Jago, L., & Fredline, L. (2004). Sport tourism or event tourism: Are they one and the same? *Journal of Sport and Tourism*, 9(3), 235–245.
- Du Preez, M., & Lee, D. E. (2015). *The economic value of mountain biking in the Baviaanskloof Mega Reserve, Eastern Cape, South Africa: A travel cost analysis using count data models*. Economic Research Southern Africa (ERSA). ERSA working paper 546 https://econrsa.org/system/files/publications/working_papers/working_paper_546.pdf [Accessed 16 Sept 2018].
- Fairer-Wessels, F. A. (2013). Motivation and behaviour of serious leisure participants: the case of the Comrades Marathon. *South African Journal for Research in Sport, Physical Education and Recreation*, 35(2), 83–103.
- Giampiccoli, A., Lee, S. S., & Nauright, J. (2015). Destination South Africa: Comparing global sports mega-events and recurring localised sports events in South Africa for tourism and economic development. *Current Issues in Tourism*, 18(3), 229–248.
- Gibson, H. (2004). Moving beyond the “what is and who” of sport tourism to understanding “why” of sport tourism to understanding “why”, *Journal of Sport Tourism*, 9(3) <https://doi.org/10.1080/1477508042000320232>.
- Gibson, H. (2005). Sport Tourism: Concepts and Theories. An Introduction. *Sport in Society*, 8(2). <https://doi.org/10.1080/17430430500101996>.
- Gibson, H. J., Kaplanidou, K., & Kang, S. J. (2012). Small-scale event sport tourism: A case study in sustainable tourism. *Sport Management Review*, 15(2), 160–170.
- Gibson, H. J., Willming, C., & Holdnak, A. (2003). Small-scale event sport tourism: Fans as tourists. *Tourism Management*, 24, 181–190.
- Green, C., & Chalip, L. (1998). Sport tourism as the celebration of subculture. *Annals of Tourism Research*, 25(2), 275–291.
- Havlick, D.G., Billmeyer, E., Huber, T., Vogt, B. & K. Rodman (2016). Informal trail creation: hiking, trail running, and mountain bicycling in shortgrass prairie. *Journal of Sustainable Tourism*, 24:7, 1041–1058 <https://doi.org/10.1080/09669582.2015.1101127>.
- Hemmonsby, J., & Tichaawa, T. (2018). The effects of major sport event leveraging for tourism and destination branding: The case of South Africa as an emerging destination. *GeoJournal of Tourism and Geosites*, 21(1), 213–282.
- Hemmonsby, H. & Tichaawa, T.M. (2019). Using non-mega events for destination branding: A stakeholder perspective. *GeoJournal of Tourism and Geosites*, 24 (1), 252–266.
- Hoffman M.D., & Wegelin JA. (2009). The Western States 100-Mile Endurance Run: participation and performance trends. *Medicine and science in sports and Exercise*, 41(12), 2191–2198.
- Jago, L., Chalip, L., Brown, G., Mules, T., & Ali, S. (2003). Building Events into Destination Branding: Insights from Experts. *Event Management*, 8(1), 3–14.
- Keech, M., & Houlihan, B. (1999). Sport and the end of apartheid. *The round table*, 88(349), 109–121.
- Kislevitz, G. (1999). *First marathons: Personal encounters with the 26.2-mile monster*. Halcottsville, New York: Breakaway Books.
- Kotze, N. (2006). Cape Town and the two oceans marathon: The impact of sport tourism. *Urban Forum*, 17(3), 282–293.
- Kotze, N., & Visser, G. (2008). Sport Tourism: Comparing Participant Profiles and Impact of Three One-Day Events in South Africa. *Africa Insight* 38(3), 61–72.
- Kruger, M., & Saayman, M. (2013). Who are the comrades of the Comrades Marathon? *South African Journal for Research in Sport, Physical Education and Recreation*, 35(1), 71–92.
- Lough, N. L., Pharr, J. R., & Geurin, A. (2016). I am bolder: A social cognitive examination of road race participant behavior. *Sport Marketing Quarterly*, 25(2), 90–102.
- Maharajh, A. (2015). A comparative socio-economic impact analysis of the 2010 Comrades Marathon on the cities of Durban and Pietermaritzburg. PhD in the Faculty of Health Sciences, University of KwaZulu-Natal. Retrieved from https://researchspace.ukzn.ac.za/xmlui/bitstream/handle/10413/13743/Maharajh_Ashok_2015.pdf?sequence=1&isAllowed=y [Accessed 18 Sept 2018].
- Mandla Radebe. (2018). Managing Director, Central Gauteng Athletics, Gauteng, South Africa, personal communication.
- McGehee, N. G., Yoon, Y., & Cardenas, D. (2003). Involvement and travel for recreational runners in North Carolina. *Journal of Sport Management*, 17 (3), 305–324.
- McKay, T., 2017. The adventure tourism industry of South Africa: organisation, space and structure, unpublished PhD thesis, University of Johannesburg. Retrieved from https://ujcontent.uj.ac.za/vital/access/manager/Repository/uj:23896?site_name=GlobalView [Accessed 1 Sept 2019].
- Moore, B. (2007). The environmental impact of running. Retrieved from <http://news.runtowin.com/2007/10/15/the-environmental-impact-of-running.html> [Accessed 12 Oct 2018].
- Moularde, J., & Weaver, A. 2016: Serious about leisure, serious about destinations: mountain bikers and destination attractiveness. *Journal of Sport and Tourism*, 20, 285–303.
- Navalta, J. W., Montes, J., Tanner, E. A., Bodell, N. G., & Young, J. C. (2018). Sex and Age Differences in Trail Half Marathon Running. *International Journal of Exercise Science*, 11(6), 281.

- Newland, B.L., & T. J. Aicher (2018) Exploring sport participants' event and destination choices, *Journal of Sport & Tourism*, 22(2), 131-149 <https://doi.org/10.1080/14775085.2018.1436464>.
- Newsome, D. (2014). Appropriate policy development and research needs in response to adventure racing in protected areas. *Biological Conservation*, 171, 259-269.
- Newsome, D., & Davies, C. (2009). A case study in estimating the area of informal trail development and associated impacts caused by mountain bike activity in John Forrest National Park, Western Australia. *Journal of Ecotourism*, 8, 237-253.
- Ng, S. L., Leung, Y. F., Cheung, S. Y., & Fang, W. (2018). Land degradation effects initiated by trail running events in an urban protected area of Hong Kong. *Land Degradation & Development*, 29(3), 422-432.
- Nyikana, S. & Tichaawa, T. (2018). Sport Tourism as a Local Economic Development Enhancer for Emerging Destinations, *EuroEconomica*, 37(2), 1-11.
- Ogles, B. M., & Masters, K. S. (2003). A typology of marathon runners based on cluster analysis of motivations. *Journal of Sport Behavior*, 26(1), 69.
- Perrin-Malterre, C., & Chanteloup, L. (2018). Hiking and snowshoeing in the Hautes-Bauges (Savoie-France): study of sports practices and forms of experience of nature. *Journal of Alpine Research | Alpine Geography Review*, (106-4). DOI: 10.4000/rga.3924.
- Richard, D., George-Marcelpoil, E., & Boudieres, V. (2010). Climate change and the development of mountain areas: what do we need to know and for what types of action? *Journal of Alpine Research*, (98-4), DOI: 10.4000/rga.1334.
- Ritchie, B., & Adair, D. (2002). The growing recognition of sport tourism. *Current Issues in Tourism*, 5(1) <https://www.tandfonline.com/doi/abs/10.1080/13683500208667903>.
- Rogerson, C.M. (2009). Mega-events and small enterprise development: The 2010 FIFA World Cup opportunities and challenges. *Development Southern Africa*, 26(3), 337-352.
- Saayman, M., & Saayman, A. (2012). The economic impact of the Comrades Marathon. *International Journal of Event and Festival Management*, 3(3), 220-235. <https://doi.org/10.1108/17582951211262675>.
- Saayman, M., Rossouw, R., & Saayman, A. (2008). Economic impact of visitor spending at the Cape Argus Pick 'n Pay Cycle Tour. *Africa Insight*, 38(3), 100-122.
- Saunders, M., & Lewis, P. (2012). *Doing research in business and management: An essential guide to planning you project*. London: Pearson Education.
- Sugden, J. (2007). Running Havana: Observations on the Political Economy of Sport Tourism in Cuba. *Leisure Studies*, 26(2), 235-251. <https://doi.org/10.1080/02614360600896734>
- Swart, K. (2005). Strategic planning-implications for the bidding of sport events in South Africa. *Journal of Sport Tourism*, 10(1), 37-46.
- Swart, K., & Bob, U. (2007). The eluding link: Toward developing a national sport tourism strategy in South Africa beyond 2010. *Politikon*, 34(3), 373-391.
- Swart, K., Bob, U., & Mbaze-Ebcock Arrey, V. (2008). Sport events and their socio-economic impact: Residents' perceptions of the Isuzu Berg River Canoe Marathon. *Africa Insight*, 38 (3), 123-134.
- Tassiopoulos, D., & Haydam, N. (2008). Golf tourists in South Africa: A demand-side study of a niche market in sports tourism. *Tourism Management*, 29(5), 870-882. <https://doi.org/10.1016/j.tourman.2007.10.005>
- Turco, D. M., Swart, K., Bob, U., & Moodley, V. (2003). Socio-economic impacts of sport tourism in the Durban Unicity, South Africa. *Journal of Sport Tourism*, 8(4), 223-239.
- Urbaneja, J.S., & Farias, E. I. (2018). Trail running in Spain. Origin, evolution and current situation; natural areas. Federación Española de Asociaciones de Docentes de Educación Física (FEADEF) ISSN: Edición impresa: 1579-1726. Edición Web: 1988-2041 (www.retos.org). <https://dialnet.unirioja.es/servlet/articulo?codigo=6367738>.
- Soler-Vayá, F., & San Martín González, E. (2017). The promotion of rural tourism through trail running: the case of Carriola in the La Vall d'Albaida region (Spain). *STEPS. Magazine of Tourism and Cultural Heritage*, 15 (1), 49-69.
- Visser, G., & Hoogendoorn, G. (2011). Current paths in South African tourism research. *Tourism Review International*, 15(1-2), 5-20.
- Visser, G., & Rogerson, C. M. (2014). Researching the South African tourism and development nexus, *GeoJournal* 60(3), 201-215.
- Wesely J.K., & Gaarder E. (2004). The gendered "nature" of the urban outdoors - Women negotiating fear of violence. *Gender and Society* 18(5):645-663.
- Wicker, P., & Hallmann, K. (2013). Estimating consumer's willingness-to-pay for participation in and traveling to marathon events. *Event Management*, 17(3), 271-282.
- *** DEAT (Department of Environmental Affairs and Tourism). (2004). *Domestic tourism growth strategy: 2004-2007*. Pretoria: DEAT & SA Tourism. https://www.gov.za/sites/default/files/growthstra_o.pdf, [Accessed 18 Sept 2018].
- *** Running USA. (2007). RRIC Annual Marathon Report 2007. Retrieved June 22, 2009, from <http://www.runningusa.org/media/wire2008/Wire2008-31.html>.
- *** StatsSA (2017a). *Domestic Tourism Survey 2014* <http://www.statssa.gov.za/?p=5431> [Accessed 13 Sept 2018].
- *** StatsSA (2018). *Domestic Tourism Survey 2018* <http://www.statssa.gov.za/publications/Po3521/Po35212017.pdf> [Accessed 17 July 2019].
- *** StatsSA (2019) *Tourism and migration*, March 2019, Statistical Release Po351 <http://www.statssa.gov.za/publications/Po351/Po351March2019.pdf> [Accessed 2 Sept 2019].

REVIEW OF PROBLEMS IN THE DEVELOPMENT OF RAIL TOURISM IN TAIWAN, ON THE EXAMPLE OF THE ALISHAN FOREST RAILWAY

Ka Leong CHONG*

Sunway University, School of Hospitality, 5 Jalan University, Bandar Sunway,
47500 Selangor, Malaysia, e-mail: danielc@sunway.edu.my

Citation: Chong, K.L. (2019). REVIEW OF PROBLEMS IN THE DEVELOPMENT OF RAIL TOURISM IN TAIWAN, ON THE EXAMPLE OF THE ALISHAN FOREST RAILWAY. *GeoJournal of Tourism and Geosites*, 26(3), 943–955. <https://doi.org/10.30892/gtg.26321-409>

Abstract: Rail tourism is significant in boosting Taiwan's tourism industry with more than 560,000 tourists visited Alishan railway, one of the most significant heritage rail tourism sites in 2018. However, recently more attentions and efforts were being put on High-Speed-Rail instead of heritage rails in Taiwan. As the Taiwan Railways Administration launched the 10 years plan in replacing the heritage rail, it has raised the question of sustainability of the heritage rail tourism in Taiwan. The study aims to assess the challenges faced in developing heritage rail tourism in Taiwan by using the Porter's Diamond Model as the assessment criteria. The data was collected through a variety of methods inclusive of interviews, observations, and review of challenges faced in the process of preparing the existing heritage railways for the future of Taiwan's rail tourism. This study found that despite the popularity, financial subsidies and extensive promotion effort by Taiwan Railways Administration, the heritage rail tourism in Taiwan is still facing difficulties in remaining sustainable in the long-run due to inefficient firm strategy, poor pricing strategy, and also non-user-friendly online ticketing system.

Key words: Tourism Policy, Rail Tourism, Porter's Diamond Model, Alishan Forest Railway

* * * * *

INTRODUCTION

Rail Tourism is commonly referred to any tourism and leisure trips that use railways to transport tourists (Jensen, 1999). The initial form of rail tourism can be traced back to 1870s where travellers sought beautiful mountainous or coastal landscapes as part of entertainment and discovery. A second form of rail tourism happened after 1950s that was related to heritage and based on enthusiasts' nostalgia for old trains developed. Eventually, a hybrid forms of rail tourism that combine discovery and heritage have emerged after 1980s. Consequently, rail tourism has increasingly been developed by combining the pleasures of discovery, comfortable travel and nostalgic searching (Pine & Gilmore, 1998).

* Corresponding author

On a specific branch of rail tourism - Heritage Rail Tourism refers to vacation that involve transportation that is conducted by heritage railway (Tillman, 2002). It is especially popular in Europe and India where the railway networks are well developed and promoted. Its popularity has caught the attention of emerging tourism operators like Japan and Taiwan in the early 1990s. However, it was only the recent years that railway tourism in Taiwan is gradually gaining back its popularity. The history of rail tourism in Taiwan dates back to 1992, when President of Republic of China, Mr. Lee Teng Hui who took the round-island train trip after the round-island network is completed gave instructions to TRA (Taiwan Railways Administration) to promote railway tourism in Taiwan (Hwang, 2010). Tourism is one of the major industry in Taiwan. According to reports by Taiwan Tourism Bureau (2015), the number of visitors travelling to Taiwan showed positive growth every year with approximately 72% of the total number of visitors visited Taiwan for recreational purposes. In 2018, out of 2,221,431 visitors, more than 560,000 tourists visited Alishan railway, which is one of the most popular tourist attractions in Taiwan (Ceicdata, 2018). The statistic shows that rail tourism is still significant in boosting Taiwan's tourism industry generating revenue of approximately USD\$732 million in 2018 solely on ticket sales (Taipeitimes, 2019).

Taiwan railway acts as one of the links for tourists to travel to places and brings tourists to different attractions in Taiwan. Thus, Taiwan government puts a lot of effort in promoting rail tourism in Taiwan. Yet, most of the promotions made by the government are more towards the Taiwan High-Speed Rail (HSR) than the Taiwan heritage railway. Currently, there are only 4 branch lines that use traditional trains in Taiwan, with some of the lines being one of the most popular tourist attractions (Tourism Bureau, 2015). However, more attention and effort are being put on HSR instead of heritage rails in Taiwan, as more High-Speed Rail (HSR) stations are being built, with a total of 12 stations as of today (Wang & Lee, 2016). The increase of High-Speed Rail (HSR) stations have raised the question of whether heritage rail would be able to sustain in the future.

Based on recent studies by Shelley (2015), the sustainability of the heritage railway is questionable, whereby it is essential to incur high cost in maintaining the heritage railways in Taiwan. As such, the cost refers to track maintenance cost, labor cost, and operation cost. For example, it could cost as high as USD\$573 million to maintain and renew the tracks that reached fatigue and replacement level, as the tracks disintegrate through time (Taiwan Railways Administration, 2016). As a result, this has led to a great challenge to the TRA. Furthermore, the heritage rail is facing sustainability issue due to strong competition. Direct competition causes heritage rail to be viewed as low speed, time consuming, and low accessibility. One of the direct competitors of heritage rail is Taiwan's high-speed rail (HSR). HSR was introduced in 2007, and it mainly depends on imported technology as well as hardware from Japan's Shinkansen line.

Additionally, HSR was supported with the European (High-Speed Train and Intercity-Express) traffic management system (Andersson, et al., 2012). With all the advantages, High-Speed Rail (HSR) is able to shorten the travel time compared to the heritage rail. In addition, the HSR route was planned to prevent the occurrence of earthquake and soft grounds in order to ensure safety for passengers (Andersson et al., 2010). Hence, the high accessibility, safety, and convenience brought by High-Speed Rail (HSR) is strongly capable in lowering the demand for heritage rail.

According to the news from the Taipei Times, TRA aimed to replace the heritage rail by purchasing 1,307 new trains within the upcoming 10 years (Shelley, 2015). As the TRA launched the 10 years plan in replacing the heritage rail, it has proven that there is an issue on the sustainability of the heritage rail tourism in Taiwan. Thus, the objectives of this research are to explore the challenges faced throughout the development process of realizing heritage rail tourism in Taiwan through reviewing the current policies,

regulations, and strategies practiced by both government and non-government bodies which have direct and indirect relationship with the railway operations.



Figure 1. Taiwan Railway System



Figure 2. Alishan Heritage Rail

LITERATURE REVIEW

Past studies on rail tourism related to market behavior were found to be the most researched area. These researches (e.g. Holley & Jain, 2007; Lyons et al., 2008; Watts, 2008; Cheng, 2010; Lyons et al., 2010; Kolosinska et al., 2018) have examined customers' behavior and their appreciation towards rail tourism. These studies aimed to understand customer's needs, the appreciation of travelling time for different type of passengers and the factors that influence passenger's choice of travelling mode. Findings have shown the factors like anxiety, travel time, service provided and purpose of travelling are the main determinant that drives the intention to travel with rail. Besides that, research on the potential of rail tourism was carried by Jain and Lyons (2008) in the United Kingdom and Brons et al. (2009) in the Netherlands. Both researches focused on future potential of rail tourism and aim to introduce new concepts that could increase the appreciation of travelling with rail. Their findings revealed that positive perception and experience could improve satisfaction. Other than that, future investment, marketing, refurbishment and railway accessibility would potentially increase the use of railway.

On the other hand, the impact of rail tourism has also caught the attention of Chan et al., and Chan (2002) and Nieuwenhuijsen et al., (2007). Their studies aimed to investigate on the level of air pollution, chemical composition and respirable particulates that the commuters are exposed while traveling on public transportation and the potential of affecting the environment (Chan et al., 2002; Nieuwenhuijsen et al., 2007). Their findings have indicated that non-air-conditioned and tram has the highest level of exposure. The dust found in the railway is considered to be even more toxic (due to high iron content) compared to ambient airborne particulates. These past studies have shown certain gaps. Firstly, most of the researches were conducted in the context of European country (e.g. France, Spain, Germany, Italy and Austria). The focus mainly is on high-speed rail,

express rail, and electric rail with little known of heritage rail. Besides that, past studies seem to emphasis mainly on the customers' behavior towards heritage rail tourism. These studies have overlooked the importance of strategies, policies and regulations governing the sustainability of the railway industry in particular to heritage railway.

METHOD

Research Approach

In order to measure the level of sustainability of heritage rails in Taiwan, factual information, thoughts, views, and preferences by the rail operators as well as users are required to be investigated. Therefore, qualitative research is used in this research, which research was carried out in the natural setting and open-ended questions are asked based on the interviewee's experience, perception and meanings towards the issues (Hammarberg, et al., 2016). Other than that, case study approach was used to obtain a comprehensive understanding of a complicated phenomenon within its real-life context (Yin, 2012). The deteriorating heritage rails in Taiwan requires an in-depth understanding on its competitiveness as compared to other competitors such as HSR in terms of demand and costing. The data was collected through a variety of methods, inclusive of interviews, observations, and review of documents.

Measures

In this study, the adoption of Porter's Diamond Model enables the research to set directions of assessment in evaluating the challenges which Taiwan heritage rails' are facing. Porter's Diamond Model is commonly used as of national competitiveness in production of a product or service (Porter, 1990). However, it was also used as a measure of business sustainability in the field of tourism studies (e.g. Hawkins, 2004; Cunha & Cunha, 2005; Hong, 2009). There are 4 elements in the Porter's Diamond Model, which are factor conditions, home demand conditions, related and supporting industries and firm strategy, structure and rivalry. Factor conditions refer to the local country's production factors such as manpower, natural resources, capital resources and infrastructure that enables a specific industry to create a product or service within the country or region (Ozgen, 2011). In view of this study, manpower, availability of spare parts and financial support are particularly important for the determination of the sustainability of a heritage railway industry (Zhang & London, 2013). Next element is the home demand conditions, which refers to the local tourist demand towards the heritage rail services (Ozgen, 2011). The domestic demand of the rail tourism industry can be one important aspects of sustainable tourism (Johnson, et al., 2011). When there is a high domestic demand, it will induce the industry to innovate and produce more advanced products or services in order to strive within the industry (Zhang & London, 2013).

The third element of Porter's Diamond Model is the related and supporting industries, which are the existence of the competitive supplying and supporting industries (Ozgen, 2011). The support of the other industries towards heritage rail tourism enables the building of network across other industries, such as hotels, travel agencies, and event companies. When the heritage rail tourism gets strong support from other industries, it would lead them to being more sustainable in terms of resources, costs, and technological transfer. Lastly, the firm strategy, structure and rivalry refers to the strategies and structures used by the heritage rail tourism operators that would influence the sustainability of its operation and to be resistant to the intensity of competition (Zhang & London, 2013). Strategies and structures of a heritage rail operation such as the ability to react to changing environment can be one of the main source of sustainability. The ability of the heritage rail operators to come out with policies, strategies and structures that are able to tackle ever-changing conditions and environment in the tourism industry is crucial (Ozgen, 2011).

Sampling Plan

The tourism bureau of Taiwan is promoting seven heritage railways (Neiwan Line, Western Line, Jiji Line, Alishan Forest Line, Pingxi Line, Eastern Line, South Line). However, this research will only focus on Alishan Forest Railway because of its popularity and it is the only heritage railway that is highly promoted by the local government (Taiwan Railways Administration, 2016). Collection of data like interviews and observation will be done throughout the visitation to Alishan Forest Railway Administration as well as railway line leading to Alishan namely the Main Line, Zhushan Line, Mianyue Line and Shuishan Line (Taiwan Railways Administration, 2016).

Shuishan Line which is previously known as Dongpu Line has been reconstructed by the Forestry Bureau in the year of 2003, however it hasn't started its operation after the restoration, therefore it was excluded from the study. Other than that, the Taiwan Forestry Bureau was also interviewed to explore the obstacles of their operation pertaining to rail tourism development. The development of heritage rail tourism in Taiwan believed to be started at Alishan railways in the year 2008 after it has been abandoned since the 1980's after Alishan Highway was built to replace railways. On 1 July 2018, the railway was taken over by the newly established Alishan Forest Railway and Cultural Heritage Office of the Taiwan Forestry Bureau (Focustaiwan, 2018).

Table 1. Measures and data Collection Plan

Areas	Indicators	Data collection
Factor conditions	The popularity of heritage rail among the locals and tourists. The effort of TRA in promoting heritage rail. The significance of advanced technology and the capacity of heritage rail. The cost incurred for maintenance.	Onsite observation at the railway station Interview with TRA and Taiwan Forestry Bureau. Visual materials such as photographs and videotape the evidence of TRA in promoting heritage rail.
Demand conditions	The demanding nature of the consumers/government/regulators towards the heritage rail.	Interview with the Alishan Forest Railway Administration and TRA with regards to demand and supply. Review of tourists statistic from the Taiwan Railways Annual Report.
Related and supporting industries	The role of travel agencies, accommodation and TRA in promoting and supporting the heritage rail tourism.	Review on the travel itinerary from the travel agents and the promotion packages introduced by TRA. Inquiry audit on hotels located near by the Alishan Railway Station.
Firm Strategy, structure & rivalry	The effectiveness of the strategies on promotion, ticketing system and the development of HSR. The support from non-profit organization. The competition between heritage rail and HSR.	Experiential audit on the online and onsite purchasing ticket system at the railway station. Interview the TRA management on the strategic planning of the heritage rail. Review of Taiwan Railways Annual Reports and Taiwan High Speed Rail Annual Reports on current performance and future development.

Data Trustworthiness

Triangulation was the approach used in this study to ensure that the data collected and the interpretation of the data to be valid and trustworthy. Triangulation is the combination of two or more data sources, researchers, methodological approaches,

theoretical perspectives, and analytical practices within the same study (Thurmond, 2001). The four types of triangulation that promote the validity and credibility of qualitative research are methods triangulation, triangulation of sources, analyst triangulation, and theory triangulation (Patton, 1999). Methods triangulation refers to viewing the same phenomena, event, or research questions, from more than single source of material (Golafshani, 2003). For example, the sources of information are observation, interview, recording, secondary data such as journals, newspaper, and books.

The particulars coming from diverse point of view can be adopted to verify, elaborate, and elucidate the research questions. It helps in restricting methodological and personal biases, as well as improving the study's generalizability (Decrop, 1999). Triangulation of sources indicates comparing the consistency of information obtained from different sources through the same method (Patton, 1999). For instance, this can be done by interviewing variety of sources such as the tour agency operator, person in charge of heritage rail ticketing counter, and TRA officer. Generally, a set of 6 semi-structured interview questions were administered to all different respondents covering areas of concerns, challenges, reasoning, justifications and illustrations of their thoughts pertaining to the current and future aspects of the heritage railways tourism in Taiwan.

In addition, analyst triangulation was employed in this study by having multiple analysts to construe the same data collected in order to prevent personal prejudice during interpretation of data (Hussein, 2015). For example, 3 peer researchers have interpreted the data collected from interview session together to avoid potential bias, and to enhance the reliability of data. They were asked to interpret the their respective understanding before joint discussion on initial coding and subsequently joint deliberation on axial and thematic coding. Theory triangulation denotes the researchers approach the data obtained with various concepts and theories in order to have a comprehensive understanding about the data (Reeves, et al., 2008). For instance, according to stakeholder theory, a strategic and direct objective that explains the mission will help the administrations such as TRA to avoid managerial conflict, confusion, inefficiency, as well as to be more competitive in the industry (Jensen, 2001). The detail of the interviewees is stated in Table 2.

Table 2. List of respondents and brief description

Respondents	Brief description
Expert A	Senior administrator, Alishan Forest Railway Branch. More than 20 years of operational experience and policies development pertaining to Alishan Forestry.
Expert B	Technical Specialist Recreation Division, Forestry Bureau. 15 years of experience in dealing with maintenance and up keeping of heritage rail stations.
Expert C	Administrative Office Secretary, Taiwan Railway Administration. 8 years of experience administrating issues pertaining to special projects and development of overall railway system in Taiwan.
Expert D	Conservation and Recreation Division, Facilities Management Section, Section Chief, Forestry Bureau. 12 years of experience in overseeing matters pertaining to conservation practices involving Alishan Forestry.
Expert E	Tour guide. More than 14 years of experience in bringing tours related to cultural and heritage activities within Taiwan.
Expert F	Senior administrator, Tourism Bureau of Kaohsiung City Government. More than 20 years of experience in local tourism promotional activities, development and policy making.

Data Analysis

Data analysis is the process of interpretation and analysis of the data collected (Creswell, 1994). Content analysis is used throughout the analysis of data, whereby it is

a method used by researchers to analyze data and make valid and replicable judgement through interpretation and text data coding (Hsieh & Shannon, 2005).

FINDINGS

Popularity and Promotional efforts

The heritage rail has remained its popularity mainly due to routes leading to Alishan station. Other than that, the partnerships between Taiwan's iconic Alishan Forest Railway and Swiss railway operator Matterhorn Gotthard Bahn (MGB), along with its subsidiary Gornergrat Bahn are expected to induce product development, promote tourism in Asia and Europe, and increase the popularity of heritage railway (TaiwanToday, 2016).

Appendix 1: *"Yes, the demand for the main line is very high but the supply is very low and the supply cannot meet the high demand."* (Expert A)

This situation indicates that the popularity of heritage rail would remain strong due to continual effort shown in improving the rail related facilities. Product development strategy is believed to be an important source of competitive advantage. Product development that involves innovation, or modification is a necessary process for success and survival (Brown & Eisenhardt, 1995). Other than that, the observation results and email response seem to suggest that TRA did show some degree of commitment in promoting heritage rail. Furthermore, the interview session had revealed that Forest Bureau of Taiwan (FBT) also helps in promoting heritage rail through educating visitors by distributing reading materials pertaining to the heritage railways (Appendix 2). This was supported by evidences from online audit and experiential audit, as the travel guide center, hotel in Chiayi, as well as the travel agency have assisted in promoting the heritage rail through creating and upselling tour packages in specific to heritage railways.

Appendix 2: *"In order to further promote the railways, we distribute the reading materials to the people so that they can have a comprehensive understanding about heritage railway and learn to appreciate the heritage elements. As we realized people only know Alishan as a forest railway but people do not know the specialties and the heritage values and thus, we will conduct forum hoping people will have better understanding about forest railway."* (Expert D)

Appendix 7: *"We will have more package with travel agency to attract more foreigners to take our trains."* (Expert C)

Financial and non-financial support

Based on interview session with FBT, the current profit gained by heritage railway is not sufficient to offset the high maintenance cost. However, the authorities had utilized other sources of income to support the operation of Alishan forest railway (Appendix 2). This statement is agreed by email responses from TRA (Appendix 7). Besides, it is supported by an online news stated that although high cost will be incurred in order to maintain the heritage railways in Taiwan, the government is willing to support the rail tourism (Shelley, 2015).

Appendix 2: *"We are currently making 1.3 million TWD annually but the maintenance cost annually is 3.5 million TWD. Thus, we increase the price hoping it will bring us at least 1.7 million TWD annually. We will use the profit from other recreation areas to cover the losses in Alishan forest railway."* (Expert B)

Appendix 3: *"TRA current financial resources does not sufficient to offset the maintenance cost for heritage railway. We run repayment career to support ourselves financial issue."* (Expert C)

It seems to show that the Rail Tourism in Taiwan highly depending on revenue diversification to sustain its financial performance. These may not be a critical concern as additional revenue streams enhance the firm's financial stability, and promote greater firm's longevity causing it to sustain for longer term in the industry (Carroll & Stater, 2009). Besides that, the heritage rail is currently receiving support in terms of financial resources from FBT (Appendix 2). It was also revealed that there is an issue of manpower and material shortage such as technician, train driver, train guides, counter attendants, as well as the supplies of spare part for the heritage rail (Appendix 1).

Based on observation, the maintenance of heritage rail is not easily done, as the number of qualified technician is limited and the area seems run-down. The issue of insufficient resources such as manpower, machine, and material would raise a question of sustainability of rail tourism here in Taiwan. This argument can be supported by resource management concept, as lack of resources would hinder the formation of capabilities and hence, inhibit the realization of competitive advantage (Sirmon et al., 2008).

Appendix 1: "The service area of Zhushan station is limited due to the crowd as people have no space to sit and they can only stand. Steam locomotives are not easy to maintain because the equipment could not be found now. The production company of the equipment and device needed for the steam locomotives were closed. We could not purchase the equipment and device for the steam locomotives." (Expert A)

Appendix 2: "As we know, the Alishan forest railway requires high cost to maintain it, and it has low profit margin as well resulting it to experience great loss. Since TRA is considered as a company and it is not willing to bear the losses, FBT will show support to forest railway through financial resources, and FBT will be the one that bear the losses." (Expert B)

Condition of Demand and supply

The effort in promoting heritage rail are supported by various parties, which includes the government and other supporting industries. As a result, there is a positive effect on the demand for heritage rail. Furthermore, the interviews between the FBT and Alishan Forest Railway Administration (AFRA) have indicated significant demand (Appendix 1, Appendix 2). Another interview with the Expert E shows that the demand during weekend is more than weekdays (Appendix 5). The findings are validated through the news announced by the Forestry Bureau when Alishan Forest Railway Awarded with ISO9001:2008 Certificate. The Alishan Mountain is the most popular tourist attraction for the local and foreign tourists, the heritage rail is known as the most attractive one (Forestry Bureau, 2014).

Appendix 1: "Generally I think during some holidays the demand will be high. It is seasonal. Every Wednesday during the flower blossom season, the demand will be higher than usual days..." (Expert A)

Appendix 2: "Yes, the demand for the main line is very high but the supply is very low and the supply cannot reach the high demand..." (Expert B)

Appendix 3: "Yes. We have increased the train trips from Alishan to Shen Mu station and Zhao Ping stations from 10 trips to 12 trips. Before this year's May, the round trip from Alishan to Shenmu and ZhaoPing were only 10. Now we have increased it to 12. We started the first train trip earlier..." (Expert C)

Appendix 4: "FBT does not consider this strategy because the statistics received has shown positive results whereby the seats are fully occupied..." (Expert D)

Appendix 5: "For weekday, Zhao Ping Line and Shen Mu Line are the same, but there are more people during weekends." (Expert E)

The findings evidence that the demand level for heritage rail has significant effect on the competitiveness of rail tourism. Therefore, in this case, high demand enables rail tourism to be competitive. This argument is cited by Ni (2012) stating that demand

enables the organization to achieve competitiveness and cost effectiveness through improving the level of production and quality of the product. However, the result acquired from the interview with Alishan Forest Railway Administration (AFRA) indicated the issues pertaining to insufficient supply such as lack of trains, lack of manpower and low capacity (Appendix 1). Similarly, FBT have commented the same remark. The findings are also evidently gathered through the observations, whereby there are minimum number of employees at the railway station and there is only one counter available for the customers to purchase their ticket. Besides that, there isn't any help desk that could provide any assistance for the customer except the ticketing counter.

Appendix 1: "The demand is high even during non-holidays season. During holidays, we would not promote because the ticket is limited and if there is a lot of people, there will be not enough capacity for them. The visitors have also complained about the insufficient of the ticket amount even during non-holidays season." (Expert A)

These result seems to suggest that the competitiveness of the Heritage Rail Tourism in Taiwan would be disadvantage from the much equipped and manned High-speed rail counter-parts. According to Gucl (2016), the main element for the organization to be competitive and allow business to grow is the availability of resources. In view of travellers comment, common complaints pertaining to the facility of the railway station are related to the cleanliness of the toilet, and the insufficiency of seating capacity in the train. (Appendix 1).

Appendix 1: "...Sometimes we also received complaints from passengers that the toilet is not clean or the train is not enough especially the Zhushan line. The service area of Zhushan station is limited due to the crowd as people have no space to sit and they can only stand." (Expert A)

Strategy, Structure and Rivalry

The observations have shown that the online ticketing system of from Chiayi Railway Station to Fengqihu Station is not clear and confusing. The online booking system of Alishan Railway Station is also difficult for the foreign tourists. According to Taiwan Railways Administration website (www.railway.gov.tw), some of the stations do not appear as an option. Other than that, from the Alishan Forest Railway Online Ticketing System website, it only shows information using Traditional Mandarin and there are no choices of language such as English or other languages given in the website.

The issue of poor online ticketing system would affect the demand of visitors towards Alishan Railway. Visitors, mainly foreigners, may feel reluctant to visit Alishan Railway due to the inefficient online ticketing system provided by TRA, leading to lower competitiveness. According to Teimouri, Yaghoubi and Kazemi (2012), high quality electronic services would lead to higher customers purchasing intention.

There is no direct competition between other railway system and heritage rail in Taiwan. However, there is an intense competition between the heritage rail, tour buses and forest trails and shuttle buses in Alishan Railway Station (Appendix 3). There is also competition between districts tourism in Taiwan (Appendix 6).

Appendix 5: "We took the bus", "They travel through bus", "We walk up here" (Expert E)
Appendix 6: "Matters related to Alishan Railway have to interview Chiayi Tourism Bureau as it is under their govern. We are actually competing with each other to attract tourists." (Expert F)

FBT had just increased the price of the heritage rail fare in Alishan station after 20 years of fixed ticket price. The fares are set based on the distance of the railway from one station to another added with a base price set by the FBT. The setting of ticket prices

based just on the distance is deemed unreasonable because there are other aspects such as the service provided, infrastructures offered, manpower and heritage preservation efforts that sum-up a higher operating costs.

Appendix 1: "The ticketing system is simplified by the government sector which is by using the distance to determine the price set for the tickets.... we have a base distance which if the price of the ticket is below the base price, we would add the base price and the price counted by the distance together and it would determine the price of the tickets." (Expert A)

The pricing strategy used by FBT that takes neither demand nor cost into consideration while setting the price would decrease the competitiveness of Alishan Railway and eventually affects the sustainability of the heritage railway in the future. According to Navickas and Malakauskaite (2009), price could be set based on indicators which include infrastructure development, environment, technological development, human resource, social development and human tourism in order to be competitive.

Related and Supporting Industries

Through the interviews with the tour guides in Alishan National Scenic Area (ANSA), it shows that the travel agencies do not put in a lot of effort in supporting the Alishan Heritage Railway (Appendix 3). Only 30% of the tour guides are willing to promote Heritage Rail due to the schedule, tourist demographic and price sensitivity towards the increase of ticket price. Other than that, the itinerary of many tour agencies do not promote Heritage Railway but promoting high-speed rail as main transport.

Even though some of the tour agencies do promote Alishan, but they do not suggest travelers to go on Heritage Rail. The enquiries session at the hotels near ANSA showed negative responses towards the promotion of Heritage Railway. Through the samples, none of the staff from all hotels has suggested for Heritage Rail Tour. However, on the websites of the hotels, it does suggest Alishan Heritage Railway but it was not translated into foreign languages. Even though the website of the hotel does mention about Alishan Heritage Rail, however the last update was in the year of 2005. Other than that, some hotels do not even promote anything about Alishan on their webpage. Overall, the support of promoting Heritage Railway from the Hotels nearby is very low.

Appendix 3: 'tour guides are given authorities to decide on whether to promote Heritage Rail' (Expert C)

The support from the hotel especially the concierge is much needed to improve the competitiveness of heritage rail tourism in Taiwan. According Mackenzie (2013), Concierge plays an important role in promoting the destination and creates excitement for the travelers. Besides that, TRA has a plan to draw more visitors through partnerships (Appendix 3) and FBT has given financial support to Heritage Railway (Appendix 1). While AFRA (Appendix 2) invested in maintaining the operations of the Heritage Rail.

Appendix 1: 'We have to enhance the infrastructure and make it stronger. We have to invest another amount to prevent the disaster' (Expert A)

Appendix 2: 'The most significant resource to maintain forest railway is financial resource. Although the maintenance cost will be extremely high, we are still willing to repair and preserve it due to the heritage and historical value. (Expert B)

Appendix 3: 'In the future, we will have more package with travel agency and High Speed Rail to attract more foreigners to take our trains.' (expert C).

CONCLUSION & IMPLICATIONS

Despite the high popularity, financial subsidies and effective promotion effort by TRA, heritage rail tourism in Taiwan, especially in the case of Alishan Forestry Railway, is

facing difficulties in remaining sustainable in the long-run. Without efficient firm strategy and structure, which are poor pricing strategy and online ticketing system, it will certainly hurt the sales of heritage rail in long term, causing the heritage rail to be disadvantaged in terms of competitiveness. Moreover, without any effort of improving the lack of resources, the competitiveness of heritage rail would be heavily affected which would lead to heritage rail being unsustainable in long term. Furthermore, with the lack of support by related industries such as accommodation around the heritage rail station, travel agencies and transportation agencies to promote heritage rail in Taiwan, heritage rail tourism would not be able to reach out to more visitors, especially foreigners.

Based on the findings, the heritage rail has been taking up the financial support from the government immoderately. Hence, it is recommended for government to support the heritage rail by developing a strong domestic financial system so that it provides a clearer cash flow of the profit generated and ease the financial planning for the development of heritage rail (Jaud et al., 2013). Besides, government is suggested to understand the value of heritage rail, and implement an appropriate pricing strategy so that to increase the revenue. It might also include cooperation from accounting, finance, sales, marketing teams to guarantee the effectiveness of the strategy (Lancioni, 2005). As a result, the government will have extra resources to invest into other advantageous tourism sectors, and making the Taiwan tourism to be more competitive.

The poor utilization of technology in this fast changing world would decrease the competitiveness of heritage rail, as it will inhibit the process of internal capability accumulation, and restrain the expansion of strength of rail tourism (Voudouris et al., 2012). Besides, it would also lead to the formation of consumers' poor perception towards heritage rail. Thus, it is suggested for government to introduce sophisticated technology in order to increase the convenience in purchasing tickets. For example, mobile commerce application should be utilized because it offers convenient, localization, as well as personalized services to the consumers. This technology is proved to enhance the efficiency of complex procedures and quality of services to consumers, as well as to save the operational cost in long run (Hussin et al., 2005). Consequently, the technology innovation not only increases value in knowledge-intensive processes, but also helps to attract the foreigners to purchase tickets leading to a rise in the degree of competitiveness of rail tourism (Enkel et al., 2009). The demanding nature of the customers is inevitable. Based on the findings, little support from the government have neglected the maintenance of the railway facilities. As the administration did not respond to facilities issues immediately, these negative complaints may lead to the formation of negative perception towards the Alishan Heritage Railway causing the image of the destination to be affected adversely. Hence, the tourists might not be willing to return to the destination in the future causing an issue of the sustainability of heritage rail in long run.

Therefore, it is recommended for the organization to perform service recovery immediately after the negative complaints arisen. The lack of support from the related and supporting industries has resulted in the Alishan Heritage Railway being unable to reach out to its target market effectively. Findings showed that the heritage railway is less competitive compared to its competitors who gain support from the related and supporting industries such as travel agencies. Jackson & Murphy (2006) stated by collaborating with the related and supporting industries closely to increase the competitiveness and reach out to customers beyond the target market more effectively.

The collaboration with the related and supporting industries enable the increase of the county's economic opportunities as it creates employment opportunities as well as business opportunities for the local communities (Ashley et al., 2007). Besides that, by working together it helps to promote the historical values of the heritage rail effectively to

attract tourists around the world. This study is limited to the focus on Alishan Forest Heritage Railway and did not include other heritage rails in Taiwan which might cause the result to be beneficial only for Alishan Heritage Railway. However, this study is able to provide considerable insights of the competitiveness of heritage rail tourism in Taiwan. Future research is suggested to research on the overall Taiwan Heritage Railway besides Alishan Forestry Railway for a wider and complete understanding.

REFERENCES

- Ashley, C., De Brine, P., Lehr, A. & Wilde, H (2007). The role of the tourism sector in expanding economic opportunity. John F. Kennedy School of Government: Harvard University, p7.
- Beirão, G. & Cabral, J. (2010). Travelling to work or just for fun? Exploring differences in perceptions and attitudes by travel modes. *Proceedings of the 12th World Conference on Transport Research society*. 470-493.
- Brons, M., Givoni, M. & Rietveld, P. (2009). Access to Railway Stations and Its Potential in Increasing Rail Use. *Transportation Research Part A: Policy and Practice*, 43(2), 136-149.
- Brown, S. L. & Eisenhardt, K. M. (1995). Product development: Past research, present findings, and future directions. *Academy of management review*, 20(2), 343-378.
- Carroll, D. A. & Stater, K. J. (2009). Revenue diversification in nonprofit organizations: Does it lead to financial stability? *Journal of Public Administration Research and Theory*, 19(4), 947-966.
- Chan, L., Lau, W., Lee, S. & Chan, C. (2002). Commuter exposure to particulate matter in public transportation modes in Hong Kong. *Atmospheric environment*, 36(21), 3363-3373.
- Cunha, S. K. D., & Cunha, J. C. D. (2005). Tourism cluster competitiveness and sustainability: proposal for a systemic model to measure the impact of tourism on local development. *BAR-Brazilian Administration Review*, 2(2), 47-62.
- Cheng, Y. (2010). Exploring passenger anxiety associated with train travel. *Transportation*, 37(6), 875-896.
- Creswell, J. (1994). *Research Design: Qualitative & Quantitative Approaches*. London: Sage Publications Ltd, p89.
- Decrop, A. (1999). Triangulation in qualitative tourism research. *Tourism management*, 20(1), 157-161.
- Forestry Bureau (2014). Alishan Forest Railway Awarded with ISO9001:2008 Certificate Again. Retrieved from: <http://www.forest.gov.tw/ct.asp?xItem=69421&ctNode=1375&mp=204>.
- Golafshani, N. (2003). Understanding Reliability and Validity in Qualitative Research. *The qualitative report*, 8(4), 597-606.
- Hammarberg, K., Kirkman, M. & de Lacey, S. (2016). Qualitative research methods: when to use them and how to judge them. *Human Reproduction*, 0(0), 1 - 4.
- Hawkins, D. E. (2004). Sustainable tourism competitiveness clusters: application to World Heritage sites network development in Indonesia. *Asia Pacific Journal of Tourism Research*, 9(3), 293-307.
- Hsieh, H. & Shannon, S. (2005). Three Approaches to Qualitative Content Analysis. *Qualitative health research*, 15(9), 1277-1288.
- Hussein, A. (2015). The use of triangulation in social sciences research: Can qualitative and quantitative methods be combined? *Journal of Comparative Social Work*, 4(1), 1-12.
- Hussin, W. H. W., Coulton, P. & Edwards, R. (2005). Mobile ticketing system employing Trust Zone technology. *In Mobile Business*, 651-654.
- Hwang, J. (2010, April 17). Getting on Track. Retrieved from: <http://taiwaninfo.nat.gov.tw/fp.asp?xItem=92069&CtNode=124>.
- Jackson, J. & Murphy, P. (2006). Clusters in regional tourism an Australian case. *Annals of Tourism research*, 33(4), 1018-1035.
- Jain, J. & Lyons, G. (2008). The Gift of Travel Time. *Journal of Transport Geography*, 16(2), 81-89.
- Jaud, M., Kukenova, M. & Strieborny, M. (2013). Finance, comparative advantage, and resource allocation. Available at SSRN 1745143, 1-26.
- Jensen, R. (1999). *The Dream Society* (How the coming shift from information to imagination will transform your business). New York: McGraw-Hill.
- Jensen, M. C. (2001). Value maximization, stakeholder theory, and the corporate objective function. *Journal of applied corporate finance*, 14(3), 8-21.
- Johnson, G., Whittington, R. & Scholes, K. (2011). *Exploring Strategy*. 9th ed. Harlow: Pearson Education Limited, P134-135.
- Kolosinska, M., Petrashchak, O., Kolosinskyi, I., & Katana, A. (2018). Tourism sector in transition economy on example of Ukraine: Determinants of Competitiveness. *GeoJournal of Tourism and Geosites*, 21 (1), 239-252.
- Lancioni, R. A. (2005). A strategic approach to industrial product pricing: The pricing plan. *Industrial marketing management*, 34(2), 177-183.

- Lyons, G., Holley, D. & Jain, J. (2008). The Business of Train Travel. *Mobility and Technology in the Workplace*, 74-86.
- Lyons, G., Jain, J. & Holley, D. (2007). The Use of Travel Time by Rail Passengers in Great Britain. *Transportation Research Part A: Policy and Practice*, 41(1), 107-120.
- Navickas, V. & Malakauskaite, A. (2009). The Possibilities for the Identification and Evaluation of Tourism Sector Competitiveness Factors. *Engineering Economics*, 6(1), 37 - 44.
- Nieuwenhuijsen, M., Gomez-Perales, J. & Colville, R. (2007). Levels of particulate air pollution, its elemental composition, determinants and health effects in metro systems. *Atmospheric Environment*, 41(37), 7995-8006.
- Ni, P. (2012). The Global Urban Competitiveness Report-2011. S.L: Edward Elgar Publishing, p12.
- Ozgen, E. (2011). Porter's Diamond Model and Opportunity Recognition: A Cognitive Perspective. *Academy of Entrepreneurship Journal*, 17(2), 61 - 76.
- Patton, M. Q. (1999). Enhancing the quality and credibility of qualitative analysis. *Health services research*, 34(5), 1189.
- Pine, J. B., II, & Gilmore, J. H. (1998). Welcome to the experience economy. *Harvard Business Review*, 76(4), 97-105.
- Porter, M. E. (1990). The competitive advantage of notions. *Harvard business review*, 68(2), 73-93.
- Reeves, S., Kuper, A. & Hodges, B. D. (2008). Qualitative research methodologies: ethnography. *Bmj*, 337(3), 1020-1022.
- Shelley, S. (2015, April 4). TRA Touts 10-year Plan to Overhaul Fleet. Retrieved from: <http://www.taipeitimes.com/News/taiwan/archives/2015/03/30/2003614747>.
- Sirmon, D. G., Hitt, M. A. & Gove, S. (2008). Resource management in dyadic competitive rivalry: The effects of resource bundling and deployment. *Academy of Management Journal*, 51(5), 919-935. <http://www.taipeitimes.com/News/taiwan/archives/2019/02/22/2003710198>.
- Thurmond, V. A. (2001). The point of triangulation. *Journal of nursing scholarship*, 33(3), 253-258.
- Tillman, J. A. (2002). Sustainability of heritage railways: An economic approach. *Japan Railway and Transport Review*, 32(September), 38-45.
- Voudouris, I., Lioukas, S., Iatrelli, M. & Caloghirou, Y. (2012). Effectiveness of technology investment: Impact of internal technological capability, networking and investment's strategic importance. *Technovation*, 32(6), 400-414.
- Watts, L. (2008). The Art and Craft of Train Travel. *Social and Cultural Geography*, 9(6), 711-726.
- Hong, W. C. (2009). Global competitiveness measurement for the tourism sector. *Current Issues in Tourism*, 12(2), 105-132.
- Yin, R. K. (2012). A (Very) Brief Refresher on the Case Study Method. In: R. K. Yin, ed. *Applications of Case Study Research*. Thousand Oaks: SAGE Publications, 3 - 19.
- Zhang, P. & London, K. (2013). Towards an internationalized sustainable industrial competitiveness model. *Competitiveness Review: An International Business Journal*, 23(2), 95 - 113.
- *** Ceicdata (2018). View Taiwan's Number of Tourist. Retrieved from: <https://www.ceicdata.com/en/taiwan/number-of-tourists-by-tourist-attractions/number-of-tourist-ns-alishan-ns>.
- *** Focustaiwan (2018, June 23). Forestry Bureau to take over operation of Alishan railway. Retrieved from: <http://focustaiwan.tw/news/asoc/201806230014.aspx>.
- *** Taiwan Tourism Bureau (2015, April 5). Rail Tour. Retrieved from: <http://eng.taiwan.net.tw/m1.aspx?sNo=0002039>.
- *** TaiwanToday (2016, June 13). Taiwan, Switzerland ink railway collaboration pacts. Retrieved from: http://www.centralamericaproduct.org/en/news_content.php?sn=12736.
- *** Taipeitimes (2019, February 22). TRA unveils new tourist train service. Retrieved from:
- *** Tour Guide (2016, May 15). Personal Interview.
- *** Tourism Bureau, R. o. C. (2015, April 17). Rail Tour. Retrieved from: <http://eng.taiwan.net.tw/m1.aspx?sNo=0002039>.

Submitted:
23.07.2019

Revised:
14.10.2019

Accepted and published online
15.10.2019

UNDERSTANDING SUSTAINABILITY, CORPORATE SOCIAL RESPONSIBILITY AND RESPONSIBLE TOURISM IN LITERATURE VS PRACTICE

Love Odion IDAHOSA*

School of Tourism and Hospitality, University of Johannesburg,
Auckland Park, Johannesburg, e-mail: loveoi@uj.ac.za

Citation: Idahosa L.O. (2019). UNDERSTANDING ENVIRONMENTAL SUSTAINABILITY, CORPORATE SOCIAL RESPONSIBILITY AND RESPONSIBLE TOURISM IN LITERATURE VS PRACTICE. GeoJournal of Tourism and Geosites, 26(3), 956–973. <https://doi.org/10.30892/gtg.26322-410>

Abstract: This paper provides evidence of the gaps in literature vs practice with regard to three sustainability and tourism related concepts: environmental sustainability, corporate social responsibility, and responsible tourism. A conceptual framework on the linkage between these concepts, as described in the literature, is developed and juxtaposed with a framework developed from content analysis of 30 interview transcripts where tourism accommodation industry stakeholders discuss their understanding of these concepts. Results reveal significant areas of overlap between theory and practice with outliers unique to the geographical and industry context. This highlights the importance of taking the local context into consideration in academic research and enquiry relating to industry and practice. These findings are relevant for academics and policymakers who aim to develop policy solutions to address sustainability challenges and improve CSR and responsible tourism uptake in their respective local contexts.

Keywords: Environmental sustainability, Corporate Social Responsibility, Responsible Tourism, Accommodation, Literature vs Practice.

* * * * *

INTRODUCTION

The conversation on the need for environmental sustainability in tourism is extensive and rich and has even given birth to the concept of ‘responsible tourism’ which is lauded as the correct way to ensure that tourism is not only profitable but also sustainable (Cape Town Declaration, 2002; Musavengane, 2019). This approach has been adopted, not only by academics but also, by multinational organisations such as the UNWTO who operate in the tourism support and regulation space at the international level (World Tourism Organisation (UNWTO), 2016). At the industry and practice level, the adoption of sustainable tourism practices has become a trend, with tourism operators even carving out niches based on an ‘environmental sustainability

* Corresponding author

compliance' branding, evident in the emergence of a new tourism type branded 'ecotourism' (Andersson & James, 2018). Many of these operators have learned to advertise their products as being sustainable and while in some cases, these practices are genuine, many establishments that advertise the sustainable tourism brand have, at best, basic sustainability compliance, with the majority of them having very little compliance evidence to back up their claim (Andersson & James, 2018; Chen et al., 2019; Parguel et al., 2011; Ramus & Montiel, 2005). Similarly, to stay trendy with the sustainability fad, environmental sustainability has been fused with Corporate Social Responsibility (CSR), especially at the firm level, with many organisations branding their CSR activities as environmental sustainability, and vice versa.

In many cases, the reason for this has been attributed to a lack of honesty by businesses, encouraged by the capitalist paradigm of profitability at whatever cost (Chen et al., 2019; Ramus & Montiel, 2005). However, in this paper, a different reason is proposed and investigated, especially in realisation of the fact that understanding of technical concepts such as sustainability and corporate responsibility is context-specific (Morelli, 2011). The reason is framed around the following question: do these businesses understand what it means to be sustainable? This question is pertinent, especially in the Global South where the dynamics of civil society education is not only poor (i.e. with high illiteracy rates) (Cooper & Ozdil, 1992; Kimbu & Tichaawa, 2018; Matten & Moon, 2008; Tichaawa, 2017), but also seldom incorporates the need for environmental consciousness and sustainability in its curriculum (Leal Filho et al., 2019; Nagendra, 2018). Although many tourism programs at the higher education level now incorporate sustainability in their curriculum, this would not translate to improved understanding in tourism markets in the Global South as the majority of tourism operators do not have formal tourism training (Bakker, 2019; Fatima et al., 2019).

Adopting South Africa as a Global South case study, this paper investigates the extent to which tourism operators in the accommodation industry understand the concept of environmental sustainability and how it relates to tourism. Primarily, the extent to which conversations on sustainability, CSR and responsible tourism in academic discourses have any bearing on industry understanding and practice is investigated to assess if academic conversations are relevant and understood at the industry level. To do this, a conceptual framework is developed which links academic literature's conceptualisation of three terms – environmental sustainability, corporate social responsibility, and responsible tourism – to industry conceptualisations. These concepts have gained significant attention in the literature and Figures 1 and 2 show the trend in total publication of the three concepts in the last two decades as retrieved from Web of Science (Clarivate, 2019) and Google Scholar (Google, 2019). The choice of these concepts is further driven by the significant overlap between them, especially in tourism discourse and literature. The data in Figure 1 and 2 were sourced by searching for each term within the two databases and compiling the total result outputs over the period 2000 to 2019. The choice of Google Scholar and Web of Science was driven by their reputation as reliable scholarly databases (Falagaset al., 2008). Figures 1 and 2 show that CSR and environmental sustainability have followed a very similar trend, reaching their peak around the year 2013, according to Google Scholar, although the CSR literature dominated the sustainability literature by up to 200% in most years. The responsible tourism literature has not been as dominant, maintaining a relatively constant publication rate over time, only picking up momentum in the last decade.

In this study, the literature interpretation of each of these three concepts is explored and synthesised to develop a conceptual framework. Field data from tourism

operators' understanding of the three concepts in South Africa is then analysed in line with the conceptual framework developed to identify existing gaps and areas of overlap between the academic understanding and industry's understanding. Based on the gaps and areas of overlap identified between academia and industry, recommendations are made for closing existing gaps identified to ensure that on the side of academia, future research is based on the appropriate premise (i.e. correct understanding of field conceptualisation of concepts) to ensure the continued relevance of academia to real-life contexts.

Literature Trend - Total Publications 2000 to 2019 Web of Science

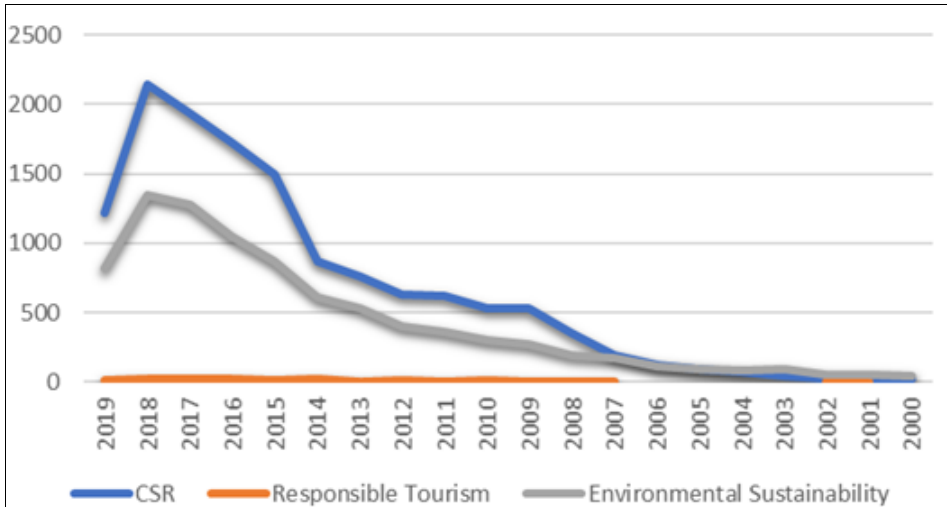


Figure 1. Web of Science Publication Trend on CSR, Responsible Tourism and Environmental Sustainability (Source: Clarivate, 2019)

Literature Trend - Total Publications 2000 to 2019 Google Scholar

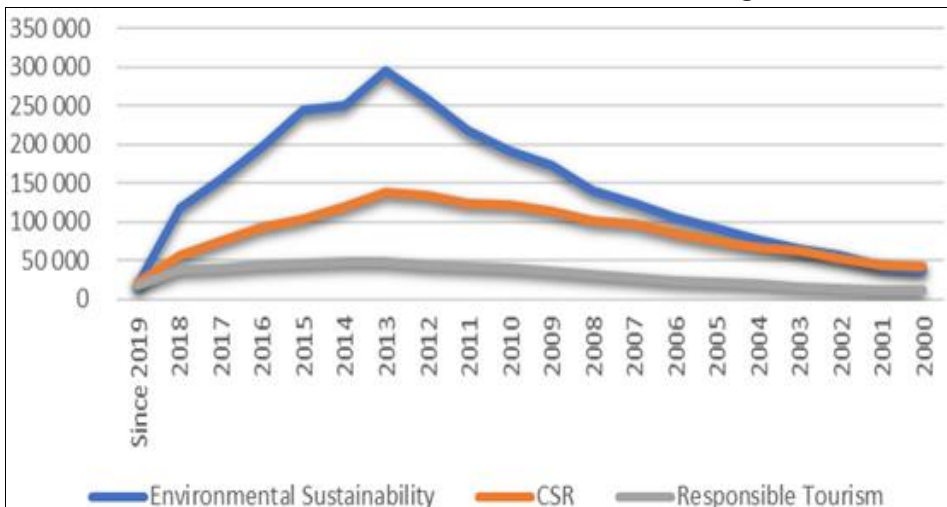


Figure 2. Google Scholar Publication Trend on CSR, Responsible Tourism and Environmental Sustainability (Source: Google 2019)

The study also recommends that when research into industry practices and activities are made, especially when evaluating industry compliance, evaluating the extent of understanding of the concepts in the field in each context is an important starting point if correct conclusions are to be drawn from data analysis. This is all the more important given that the extent of understanding will differ with each context, especially in varying Global South settings (Matten & Moon, 2008; Duarte et al., 2010).

Environmental Sustainability

In the literature, the concept of environmental sustainability is often used interchangeably with “sustainable development” and ‘sustainability’ more loosely (Leuenberger, 2007; Morelli, 2011). In all cases, reference is made to consideration of the environment/ecosystem in which humans dwell. Central to the discourse of environmental sustainability is the concept of climate change. In fact, in many academic studies, it forms the basis for approaching the sustainability debate as the biggest environmental threat facing humanity and the planet (Coleman et al., 2017; Nolet, 2015; Williams & Schaefer, 2013). Climate change is primarily concerned with the health of the planet and ensuring that its capacity to heal itself is not compromised to the detriment of humanity. At the core is ensuring the resilience of both the planet and the people and species inhabiting it (Leuenberger, 2007; United Nations, 2019).

Beyond academia, climate change is also the focus of sustainability, with governmental policies, and even civil education, addressing the sustainability issue from this perspective (Coleman et al., 2017; Leuenberger, 2007; Williams & Schaefer, 2013). Given that even at the most basic level of introduction to sustainability – schools, climate change is chosen as the preferred example for easing students into the sustainability concept (Nolet, 2015; Coleman et al., 2017), it is plausible to assume that general understanding of environmental sustainability by civil society, as well as industry practitioners, would incorporate some elements of climate change. This climate change approach to environmental sustainability can be argued to embody an understanding of the concept to mean *resilience building*.

Similarly, a discussion on environmental sustainability is incomplete without reference to sustainable development (Leuenberger, 2007; Morelli, 2011). With climate change identified as one of the most threatening issues of our time, with daunting implications for human survival, sustainable development, defined as “development that meets the needs of the present without compromising the ability of the future generations to meet their own needs”, has taken centre stage and emphasises the need for changes in human behaviour to address the alarming rate of the degradation and depletion of the planet (World Commission on Environment and Development (WCED), 1987). This takes emphasises the view of environmental sustainability as ensuring the continued survival of mankind in its habitat – an idea that can be referred to as *preservation*.

A general consensus in the move towards sustainability is that ensuring the desired intergenerational equity would most certainly require a change in lifestyle and/or behaviour to incorporate an interconnected view of relating to the planet. This would require a balanced approach that involves not just changes in consumption behaviour (Peattie & Peattie, 2009; Barr et al., 2011), but more deliberative and involved leadership transformation *that engages civil society in sustainable development planning*. In fact, Leuenberger (2007: 372) argues that “traditional, expert-based models of change may not address the impending problems of environment quickly enough and that a wider, deliberative, and transforming type of change must be adopted by leaders.” This transformative type of change would warrant not only a modification of citizens’ lifestyle, but also of corporate lifestyle.

CSR

The call for corporates to change the way business is done, especially in relation to society, pre-dates the environmental movement, and is more generally known as CSR. The literature on CSR is vast and far more extensive than that of (environmental) sustainability. At its inception, it was simply referred to as 'social responsibility' (Drucker, 1984; Kolk, 2016) with mentions of the concept as far back at the 1920 in the monographs of John Maurice Clark (1926). CSR quickly grew in popularity in the literature due to its departure from the Adam Smith school of thought in the proposition that business had obligations to society beyond the economic motive of profitability. Where Adam Smith had argued that the market, in pursuing its objective of profit maximisation, will result in society's needs being met, CSR propagators, in recognition of the failure of Smith's assumption and the widening inequality fostered by large firms pursuing their profit motives, argued that firms needed to go beyond their legal business mandates and engage in activities to improve the society (Duarte et al., 2010).

CSR activities also gained momentum with the realisation that for firms to pursue their profitability objective, they needed to ensure that their immediate operating environment is conducive for business to run smoothly. Firms, hence, had to go 'beyond profits' to secure their social capital if business was to be a success in the long run (Kolk, 2016; Mohr et al., 2001; Spence, 2016). As the centre of the discourse, the extent of 'beyond profits' has been the focus of the literature to date. In the earlier literature, this economic objective of profit-making to satisfy investors and business partners was emphasised as a key component of business's responsibility but this emphasis grew quieter over time (Duarte et al., 2010). The focus was turned to satisfying employees and society as equally relevant stakeholders in the firm's framework. The emphasis on employees referred mostly to how they were treated, focusing on issues such as decent work environments, fair wages, employee welfare, work-life balance, upskilling and capacity development, and other workplace issues (Barnett, 2019; Camilleri, 2016; Carroll, 1999; Matten & Moon, 2008; Musavengane, 2019). The society-focused approach emphasised operating within society's legal, moral and ethical framework, and going beyond this to 'giving to society' through philanthropism, volunteerism, socially responsible investment, and other forms of discretionary corporate contributions to society (Camilleri, 2016; Freeman & Hasnaoui, 2011; Matten & Moon, 2008). In essence, the focus of CSR was on business-society relations. This is reflected in the most cited CSR model in the literature in the 1980, '90s and early 2000s by Carroll (1979, 1999) where 'four pillars' of the firm's responsibility to society were itemised in a pyramid model.

These pillars were: (1) the *economic responsibility* which emphasised Adam Smith's idea of making profit by producing goods and services of value for society; (2) the *legal responsibility* of operating within the legal framework of society; (3) the *ethical responsibility* to stick to society's morals and norms; (4) and the *voluntary/discretionary responsibility* of contributing to the development of society. This approach highlights the fact that the decision on what is 'responsible' according to CSR and what activities can be included as a corporate's responsibility is entirely at the discretion of the corporate/firm, although this is increasingly influenced by pressure from academics and civil society.

Where in modern literature, it can be argued that it is impossible to divorce sustainability from the CSR discourse, this was not always the case. The four pillars model and other earlier models were silent on the environment. It is only in recent times, especially with the increased propagation of climate change concerns and need for environmental sustainability, has the concept of the environment been integrated into the definition and understanding of CSR (Duarte et al., 2010). The award for the most popular

model of CSR in contemporary literature which incorporates environmental concerns can arguably be attributed to the 'triple-bottom-line' model developed by John Elkington (1998). This model follows the trajectory of its predecessors in that it emphasises people (social responsibilities) ahead of profits (economic activities) and is unique in its incorporation of the planet (environmental responsibility) as a stand-alone objective / responsibility of business. The CSR emphasis of this model is consistent with the tenets of sustainable development where economic prosperity is encouraged but with an emphasis on human and environmental preservation (Chuang & Huang, 2018; European Commission, 2001).

Responsible Tourism.

Responsible tourism can be argued to be CSR-customised for the tourism industry. It draws its roots from the sustainable tourism movement embedded in the global call for sustainable development (Saarinen, 2018). Following the definition of sustainable development by the Brundtland Commission as "development that meets the needs of the present without compromising the ability of future generations to meet their own needs" (World Commission on Environment and Development (WCED), 1987: 41), the World Tourism Organisation (WTO) specified that "Sustainable tourism development meets the needs of the present tourists and host regions while protecting and enhancing the opportunity for the future. It is envisaged as leading to management of all resources in such a way that economic, social, and aesthetic needs can be fulfilled while maintaining cultural integrity, essential ecological processes, biological diversity and life support systems" (World Tourism Organization, 1998).

Given that communities and the natural environment constitutes the tourism industry's base of operation and main industry product, the emergence of responsible tourism can be said to be a natural product of the increased climate change concerns and corresponding call for sustainability, combined with the growth in CSR uptake in the private sector driven by both academia and civil society (Burrai et al., 2019; Caruana et al., 2014). The origin of the concept of responsible tourism can be traced to Krippendorf (1987) but was formalised at the international level at the 'Responsible Tourism in Destinations' conference in South Africa, an event which preceded the 2002 World Summit on Sustainable Development and culminated in the Cape Town Declaration (Burrai et al., 2019; Fennell, 2008; van der Merwe & Wöcke, 2007). The Cape Town Declaration defines Responsible tourism as "tourism which:

- minimises negative economic, environmental and social impacts;
- generates greater economic benefits for local people and enhances the wellbeing of host communities;
- improves working conditions and access to the industry;
- involves local people in decisions that affect their lives and life chances;
- makes positive contributions to the conservation of natural and cultural heritage embracing diversity;
- provides more enjoyable experiences for tourists through more meaningful connections with local people, and a greater understanding of local cultural, social and environmental issues;
- provides access for physically challenged people;
- is culturally sensitive, encourages respect between tourists and hosts, and builds local pride and confidence" (2002: 2).

From this definition, the responsible tourism concept espouses the concerns of sustainable tourism but takes this further by emphasising morals and ethics as they relate to tourism's impact on local communities and surroundings, hence aligning with the more

general CSR term, defined by the World Travel and Tourism Council (WTTC) as “the means of adopting open and transparent business practices that are based on ethical values” (as cited by Frey & George, 2010: 623). These values are further elaborated in the ten principles of the UN Global Compact (2005 a, b). This responsible tourism definition, however, emphasises a stakeholder-community approach in defining what constitutes the best business practice. Klein (2011) categorises the focus of the responsible tourism definition into three broad groups: (1) the environmental impact of tourism; (2) fair and equitable distribution of the economic benefits of tourism to the host communities; and (3) mitigating the negative socio-cultural and heritage impact of tourism. Responsible tourism, hence, lays emphasis on incorporating local/host communities in the decision-making process, improving access to employment opportunities for local community members, contributing to responsible governance, abnegating corruption, reducing economic leakages, increasing inclusion for women and the disabled, ensuring fair labour standards, and ensuring that resources (natural, ecological, cultural, and heritage) are sustainably managed (Booyens, 2010; Burrai et al., 2019; Caruana et al., 2014; Cooper & Ozdil, 1992; Fennell, 2008; Idahosa, 2018; Klein, 2011).

Responsible tourism and CSR can be said to be similar in that they are both discretionary in the definition of what activities fall within the purview of the firm, although responsible tourism stretches the firm-centred decision making to a more inclusive stakeholder-centred approach. As such, when considering responsible tourism, the focus is not on whether or not the corporate adopts certain best practices, but on the impact of its activities on the host population and environment (Fennell, 2008; Klein, 2011; Saarinen, 2018). In the tourism literature, the two terms (CSR and responsible tourism) are, however, often used interchangeably (Caruana et al., 2014; Frey & George, 2010). Although the term is often associated with terms such as ethical tourism, pro-poor tourism, and ecotourism (van der Merwe & Wöcke, 2007; Pro Poor Tourism (PPT), 2002; Yu et al., 2019), it is important to highlight that while these forms of tourism constitute tourism niches/products, responsible tourism is not a product but a ‘way of doing tourism’ (Cape Town Declaration, 2002; Department of Environmental Affairs and Tourism, 2002; Booyens, 2010).

The Nexus Between Environmental Sustainability, CSR, and Responsible Tourism

While the preceding discussion already highlights that a close relationship exists between environmental sustainability, CSR and responsible tourism, for the purpose of this study, the discussed literature is synthesised using the content analysis method to develop a conceptual framework that establishes the areas of overlap in the three concepts. In this synthesis, at least ten studies relevant to each literature concept were consulted to identify the keywords and terminologies associated with each concept. Studies in the fringes of the literature were also consulted to identify new words or terms that might emerge. For this study, only words which occur in at least five studies were included and only selected studies where the words occur are referenced in this article. Finally, the key terms/words associated with each concept in the literature were identified and then mapped based on common occurrence to create the word map in Figure 3. Words are categorised based on their association to the main concept(s) and distinguished by colours. Words in blue, red, and green boxes are unique to each individual concept. The words in blue boxes are unique to *responsible tourism* and include host/local community and environment, government support, pro-poor tourism, visitor safety and security, ethical tourism, cultural sensibilities, ecotourism, and sustainable tourism. This highlights a focus on tourism niches associated with sustainability and business-society relations.

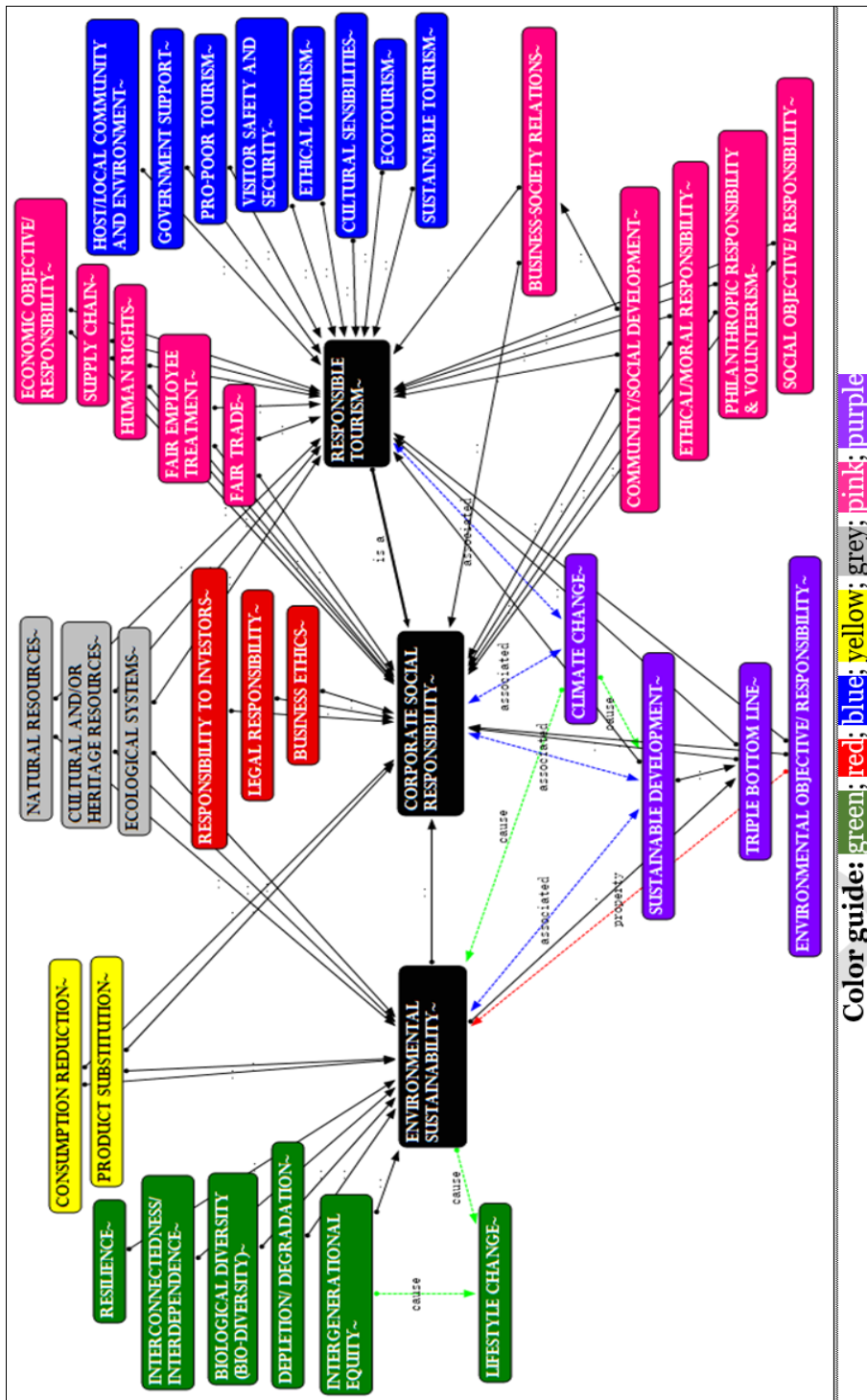


Figure 3. The Nexus between ES, CSR, and Responsible Tourism

The existence of these business niches in tourism, crafted around the global demands for sustainability and more accountable business-society relations, is a telling feature of the industry's dependence on communities, the environment, and society for success (Hassan, 2000; Mathew & Sreejesh, 2017). Similarly, words in red boxes are unique to *CSR*. They include business ethics, legal responsibility, and responsibility to investors, and highlight a primarily internal focus that has to do with the firm's framework of operations in ensuring its continued survival. Words in green boxes are unique to *environmental sustainability* and reveal a focus on preserving the natural environment, not just for itself, but as a prerequisite for human preservation. Words such as biological diversity, depletion/degradation, and resilience reflect the environmental preservation focus, while intergenerational equity reflects the human preservation focus.

Interconnectedness/interdependence highlights the relationship between the environmental and human focus while lifestyle change indicates that the dynamics of this relationship is such that the human side needs a major overhaul of its pattern of existence. Stakeholder engagement is a critical part of responsible tourism in the reviewed literature and these stakeholders include employees, government, supply chain, tourists/visitors, and investors. As expected, the three concepts of interest also share common words/terms identifiable by their colours. The words in the purple boxes are words common to all three concepts in the literature: climate change, sustainable development, triple-bottom-line, and environmental objective/responsibility. The need for 'environmental responsibility' necessitated by climate change is the common denominator in sustainable development and the triple-bottom-line concepts, and hence, ties all three concepts in this study together.

The words in the two sets of pink boxes are those which are common to *CSR and responsible tourism* in the literature: business-society relations, community/social development, ethical/moral responsibility, philanthropic responsibility and volunteerism, social objective/responsibility, economic objective/responsibility, 'supply chain' management, human rights, and fair employee treatment, and fair trade. These terminologies, especially when juxtaposed with the individual focus of each concept, emphasises the 'stakeholder management' view both *CSR* and responsible tourism share. Words in grey boxes are common to *environmental sustainability and CSR* and include consumption reduction and product substitution. These accentuate an internal focus on resource management habits in the firms. Words in orange boxes are common to *environmental sustainability and responsible tourism* and include natural resources, cultural and/or heritage resources, and ecological systems, and highlight the delicate nature of resources which sustain the human population and provide the source and environment for many economic activities. The identified areas of uniqueness and overlap across the main concepts under consideration in this study, as presented in Figure 3, form the basis for comparing literature understanding/perspective to industry understanding of the concepts.

MATERIALS AND METHODS

The study area

The chosen study area for collecting the relevant data consisted of two major urban municipalities in the Cape – Cape Town and Cape Winelands – with a significant concentration of tourism products. Cape Town is a popular tourist destination in South Africa, attracting about 2 million visitors per year, and has won numerous awards, including the UNESCO 2017 'City of Design' award and the 'Travel+Leisure' 2018 World's Best Awards (Cape Town Tourism, 2017). The Cape Winelands, well known for its wine routes, lies about 25 nautical miles from Cape Town and is a generous beneficiary of the tourism traffic that Cape Town receives.

Data Collection and Analysis

Data for this study was collected using semi-structured interviews. The interview guide was developed from an in-depth literature review, benchmarked with similar questionnaires in the literature and validated with management-level industry stakeholders. The sample frame for the study was developed using South Africa's Tourism Grading Council's website to identify areas where accommodation establishments were concentrated within the survey area. The targeted convenience sampling technique was then adopted to identify participants based on relevance to the study (i.e. tourism accommodation establishments), distance, availability, and willingness to participate (Mays & Pope, 2000). A snowballing approach was also adopted to identify and include establishments that were not registered with the grading council (Burton, 2000). This ensured that the final sample was inclusive, incorporating a wide range of accommodation types regardless of star grading, type, or size. Interviews were conducted with 30 establishments, after which saturation was reached. These interviews lasted between 25 minutes to 65 minutes and took place in the winter of 2015 (between March and September). All interviews were transcribed, coded manually using Friese's (2014) Noticing, Collecting, and Tagging (NCT) framework, and then re-coded in Atlas.ti for analysis using the Qualitative Content Analysis approach. The choice of the content analysis approach was motivated by its flexibility in allowing texts to be synthesised into related categories based on meaning and concept. This makes it ideal for qualitative data analysis where the research questions and concepts are already pre-defined (Elo & Kyngäs, 2008; Schreier, 2012). Codes developed *a priori* from the literature were incorporated with the transcribed text and analysed to develop a framework that highlights the main focus areas for each of the three concepts of interest in the industry.

The sample

The target population for this study consisted of people at the management level within tourism accommodation establishments in the study sample. These included owners, sustainability directors, administrators, operations managers, and general managers within each firm, depending on who was available for interviews. The decision to focus on individuals at the management level was driven by the fact that their positions require that they be involved in the decision making and day-to-day running of the establishments, including engaging with external stakeholders, and taking part in training and development opportunities when they present themselves (see Idahosa (2018); Tang, et al. (2014) for similar approaches). A summary of the sample characteristics is provided in Table 1. The sample collected reveals that the ownership structure of the accommodation industry in the study area is dominated by individual/family-owned businesses and partnerships. This is a result of the monopolistically competitive market structure where firms are free to enter and exit the market as they like with no restrictions, as well as the economic viability of tourism in the region – being one of the largest tourism destinations on the continent. This is also reflected in the establishment types, sizes and ratings, with smaller establishments (backpackers, BnBs and guest houses) dominating the scene (53%), supplying at most 50 rooms (67%) and mostly graded three-star and below (57%).

The participant pool reveals the flexibility of the market structure where more than half of the respondents hold both technical and administrative positions (e.g. the general manager also doubles as a maintenance manager). The sample is male-dominated – a pattern only observed at the managerial level as the majority of employees in the industry are female, with most of them (57%) working within the industry for at least a decade. Despite the gender bias, the sample demographics demonstrate that the participants hold authoritative positions to provide information on the subject of interest.

Table 1. Sample Characteristics (Data source: Fieldwork, 2015)

		% (N=30)	Cumulative %
Establishment characteristics			
Ownership structure	Single owner/family	53.3	
	Partnership	13.3	66.6
	Business group/ Board of Directors	33.4	100
Duration in business/business age	0 to 5 years	16.7	
	6 to 10 years	20.0	36.7
	11 to 20 years	23.3	60
	21 to 30 years	23.3	83.3
	More than 30 years	13.3	96.6
	Unknown	3.3	100
Number of rooms in establishment	0 to 10 rooms	26.7	
	11 to 50 rooms	40	66.7
	More than 50 rooms	33.3	100
Star grading	No Star	20.0	
	Two Star	3.3	23.3
	Three Star	33.3	56.6
	Four Star	40.0	96.6
	Five Star	3.3	100
Accommodation type	Backpacker	13.3	
	BnB	13.3	26.6
	Guest house	26.7	53.3
	Hotel	46.7	100
Participant's characteristics			
Participant's designation	Administrative	40.0	
	Technical	6.7	46.7
	Both	53.3	100
Participant's duration in the hospitality industry	0 to 5 years	33.3	
	6 to 10 years	10.0	43.3
	11 to 20 years	36.7	80
	More than 20 years	20.0	100
Participant's Gender	Female	46.7	
	Male	53.3	100

RESULTS DISCUSSIONS

To facilitate analysis, separate individual frameworks, derived from content analysis of participants' interview transcripts, are presented for each of the three main concepts of interest in this study (see Figures 4, 5, and 6). Each framework presents words that capture the industry's understanding of each concept and is then compared to the conceptual framework presented in Figure 3 to identify areas of similarities and differences. In Figure 4 to 6, the main concept under consideration is located in the middle of the diagram with arrows pointing to, or away, from it. Words in the box with the red dotted outline are those which, in the literature, are associated with the concept in focus but *do not* occur in the analysis of participants' interview transcripts. Words outside the red box, with arrows pointing towards or away from the main concept under consideration, represent those that occur both in the literature and the data transcripts. Finally, during the data analysis, additional words common to some of the main concepts were identified beyond those found in the literature. These words, while found in the literature to be un-associated with the main concept under consideration in Figures 4, 5, and 6 respectively, come up as linked to each respective concept under

consideration in the data analysis. They are identifiable in each of Figure 4, 5, and 6, as those with no arrow links to the main concept addressed by each figure.

Environmental Sustainability – Industry Context

Figure 4 shows that the literature's understanding of environmental sustainability as relating to climate change, environmental responsibility, sustainable development, consumption reduction, product substitution, depletion/degradation, interconnectedness, and need for intergenerational equity, resulting in lifestyle change, all resonate with the study's sample. However, more formal concepts such as the triple-bottom-line, sustainable development, biological diversity, resilience, ecological systems, and culture/heritage resources did not come up amongst the description of environmental sustainability by the accommodation operators in the sample. Beyond the literature's description of the term, respondents also referred to environmental sustainability as relating to terms more often associated with CSR and responsible tourism in the literature such as fair trade, the economic responsibility of creating jobs, community/social development, supply chain activities, and more generally, the way the businesses relate to their communities and the society at large. The climate change understanding is palpable amongst respondents with repeated reference to the need for 'greening' of organisational practices, and for minimising carbon footprints.

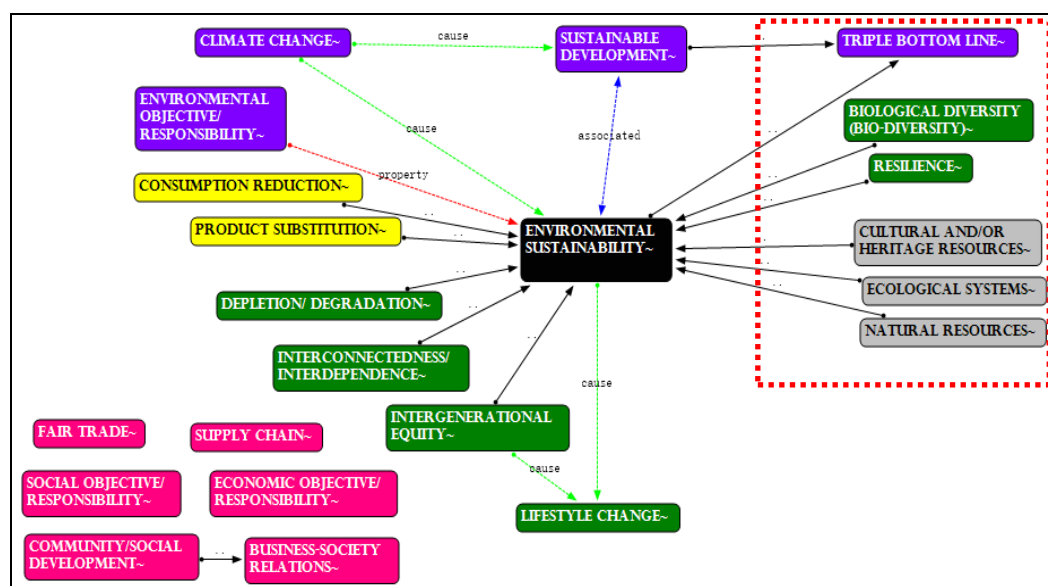


Figure 4. Environmental Sustainability Conceptualisation in the Industry (Source: Fieldwork, 2015)

CSR – Industry Context

A key observation from Figure 5 is that the majority of operators in this space do not consider the 'economic responsibility/profits' as CSR.

The inclusion of 'economic responsibility' as a common term between the industry and the literature is a result of only one respondent's reference to 'creating jobs' as a CSR. Most respondents link CSR to consumption reduction and product substitution, community/social responsibility, and environmental responsibility. The omission of the economic side of things in the respondent's understanding of CSR indicates that the theoretical models in the literature such as Elkington's (1998) triple-

bottom-line and Carroll's (1979, 1999) pyramid model of business obligations do not reflect the understanding in this study's sample. Similarly, the link to climate change which comes up in the literature does not occur in the sample, neither do sustainable development, ethical/moral responsibility, responsibility to investors, or fair trade.

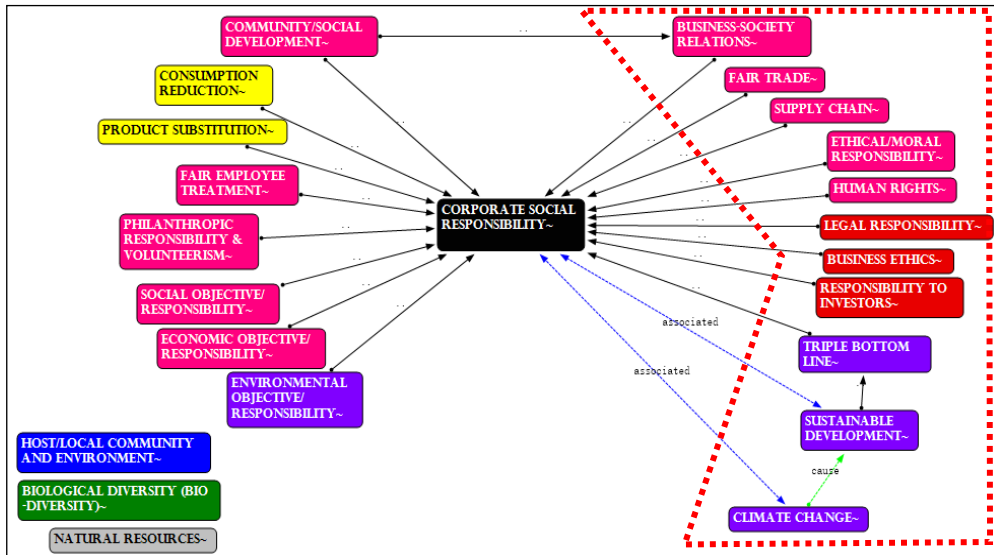


Figure 5. CSR Conceptualisation in the Industry (Source: Fieldwork, 2015)

Respondents' understanding of CSR centres around their responsibility and interactions with their communities, their employees, and the environment. This includes philanthropic donations to the disadvantaged and charities; educating guests on the need to be environmentally conscious and to respect the local ecosystem; being conscious of their resource consumption habits by reducing consumption and substituting resources with environmentally sustainable alternatives where possible; and employee-related responsibilities which include employing locally, training their employees and giving them opportunities to develop themselves. Respondents expressed the understanding that in employing and training members of the local community, they were also contributing to the development of the community. The analysis also shows that in addition to understanding CSR as including environmental responsibility, the study respondents also linked the concept to their responsibility to their host communities/environment – an idea that occurs more pronouncedly in the responsible tourism literature than in the CSR literature. This supports the argument put forward in this study that Responsible Tourism is CSR-customised to the tourism industry, emphasising the firm's relationship to the host/local community and environment. Similarly, the environmental sustainability emphasis on biological diversity is linked to CSR, suggesting that CSR in this location is strongly associated with the environmental component.

Responsible Tourism – Industry Context

The results of responsible tourism understanding are presented in Figure 6. An interesting finding is the fact that all the terms synonymous with responsible tourism in the literature (i.e. ethical tourism, ecotourism, pro-poor tourism, sustainable tourism) do not come up in this study sample. Similar to the CSR finding, more theoretical concepts like the triple-bottom-line, sustainable development and ecological systems,

which permeate the literature, do not come up in respondents' description of their understanding of responsible tourism. Similarly, the literature's focus on culture and heritage, human rights and ethical behaviour, and other external stakeholder (e.g. government and supply chain) engagement and responsibilities, are missing from the study respondents' understanding of responsible tourism. The only external stakeholders alluded to in the description of what responsible tourism is, were communities and tourists, with emphasis for tourists being on ensuring their safety and security. Responses are, however, very strong on the issue of community engagement and development, philanthropy and volunteerism, fair employee treatment, fair trade, climate change, and environmental responsibility. One respondent also referred to financial sustainability as a component of responsible tourism, alluding to the economic responsibility of the firm as identified in the literature. Also, beyond the literature's description of the term, respondents in this study emphasised resource management (i.e. consumption reduction and product substitution) as key aspects of responsible tourism in order to address issues of depletion and degradation.

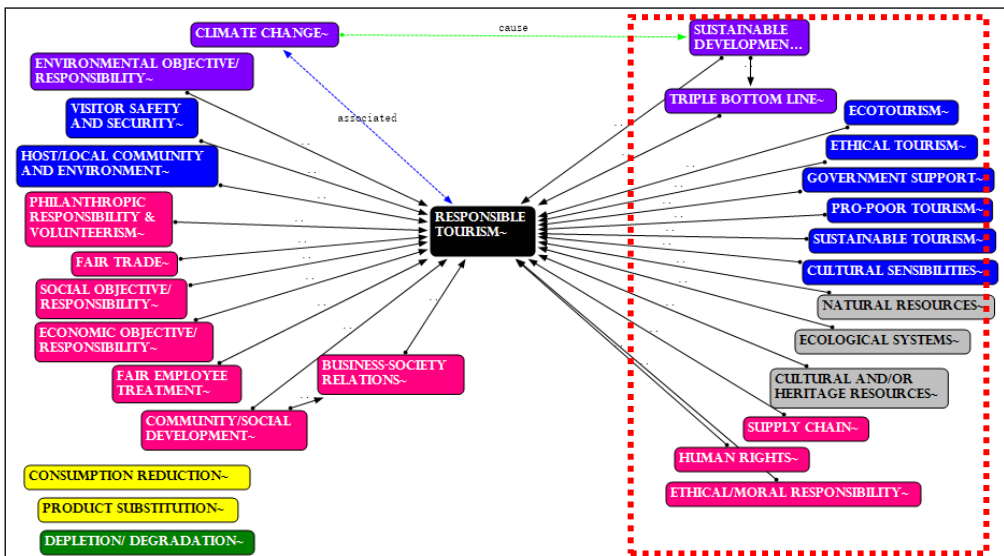


Figure 6. Responsible Tourism Conceptualisation in the Industry (Source: Fieldwork, 2015)

Discussion

These results indicate that while there are significant areas of overlap between the literature and the local accommodation industry context in the Cape in the understanding of environmental sustainability, CSR, and responsible tourism, there are also areas of dissonance, which highlight the importance of factoring in the local contextual understanding of academic concepts when carrying out academic research into practices in the industry. For example, where the triple-bottom-line and sustainable development concepts are a conspicuous component of CSR and responsible tourism in the literature, these terms do not occur in the data collected for the study. The fact that the sample does not link these terms to CSR and responsible tourism is further highlighted by the limited occurrence of the 'economic responsibility' of the firm as a CSR item in the data. This can be explained by the characteristic of the local geography where the industry is monopolistically competitive, such that formal education in business management –

where the exposure to these CSR models and concepts are taught – is not required to run an accommodation establishment, especially for locally owned establishments which form the bulk of the population. The results also show that in the study sample, respondents do not distinguish uniquely between sustainability, CSR and responsible tourism, as is done in the literature. As opposed to the literature where environmental sustainability is typically focused on the planet/physical environment, respondents in this study considered both their social/community and economic responsibilities as part of environmental sustainability, indicating a fusion of the concept of sustainability with CSR and responsible tourism. This can be argued to be indicative of the way knowledge is disseminated in the industry in this geographical location where discussions on responsibility in tourism overlap and are not finely separated into economic, social or environmental responsibility, as is done in the literature.

Furthermore, consistent with the literature, respondents had a strong ‘climate change’ approach to understanding sustainability with an emphasis on ‘carbon footprints’ and ‘greening’. This is explainable by the extreme weather conditions experienced by residents in South Africa in the last decade, which have triggered popular civil society conversations, and have been explained as resulting from global warming due to climate change (Wright et al., 2015; Alfreds 2018; Writer, 2019). This perspective triggers an individual consciousness to modify behaviour which is demonstrated in the popularity of ‘consumption reduction’ and ‘product substitution’ as key terms associated with sustainability and business responsibility. This is consistent with the findings of Idahosa (2018), as it reveals that the operators in the accommodation industry understand issues of environmental sustainability and responsible tourism as relating primarily to how resources are managed in terms of consumption reduction and product substitution. This is contrary to the literature where product usage is not a strong emphasis in the responsible tourism discourse. This might be because the data for this study was collected within the same period as Idahosa’s (2018) study during which South Africa was going through severe energy and water shortages (Cohen & Burkhardt, 2015; Fioramonti, 2015; Idahosa, 2018), and demonstrates the way in which the socioeconomic, environmental, and even political occurrences in a local context can influence stakeholder’s understanding of academic and global concepts. The finding that all the terms synonymous with responsible tourism in the literature (i.e. ethical tourism, ecotourism, pro-poor tourism, sustainable tourism) do not come up the current study can be said to support the argument put forward by Cooper and Ozdil (1992) who argue that these tourism niches are more the preserve of developed economies in the Global North. Consistent with their finding for Portugal which had then only just launched its tourism product, responsible tourism in South Africa, particularly in the accommodation industry in the Cape, is more focused on the host communities and environments (Cooper & Ozdil, 1992; Fatima et al., 2019). This finding can also be attributed to the fact that the focus of this study is on accommodation establishments only. Given that niches such as ecotourism and pro-poor tourism are more the preserve of the tour operators industry, it is plausible that studies investigating this segment of the industry will yield different findings.

CONCLUSION

This study explores the extent to which the academic literature reflects the local industry’s understanding of three key concepts in the tourism accommodation industry: environmental sustainability, corporate social responsibility, and responsible tourism. Following a synthesis of the literature for key words used to explain and/or describe each of these concepts, the study finds that these concepts largely overlap, and are, in some

cases, embedded within each other. For example, the environmental responsibility aspect of environmental sustainability is a common theme across both CSR and responsible tourism. While this environmental aspect has not always been a prominent aspect of the CSR discourse, it has seen a proliferation in its incorporation in CSR since the proliferation of the climate change debate in the last two decades. Consequently, climate change occurs as a common thread across all three concepts, as does sustainable development and the triple-bottom-line. The literature synthesis also indicates that responsible tourism is a form of CSR, customised for the tourism industry. This is presumably a result of the strong dependence of the industry on the environment and on local communities, which in most cases constitute the industry's product sources and even final products and is evidenced by the development of tourism niches and ideas such as ecotourism and pro-poor tourism which brand themselves as unique based on a CSR approach – a phenomenon which is rarely observed in other industries.

A comparison of the synthesised literature to a content-analysed framework of 30 interviews from managers and operators in the accommodation industry in the Cape region of South Africa, indicates significant areas of overlap between industry and the literature in the understanding of the three concepts, as well as differences that reflect the uniqueness of the local geography. The focus on climate change and resource-management in the understanding of sustainability in the data is attributed to the shifts in weather patterns in the study area which has dominated civil society conversations. Similarly, the data is silent on technical terminologies such as triple-bottom-line and sustainable development which is indicative of the local economic (Global South) environment which does not require formal management qualifications to run accommodation establishments. The accommodation specialisation of the study's participants is also evident in their understanding of responsible tourism as terms such as ecotourism and pro-poor tourism, which are associated with responsible tourism in the literature, do not come up in the data, arguably because they are more the preserve of the tour operators sub-industry. This study demonstrates that while the literature, to a large extent, captures the pulse of this local geography on the concepts of environmental sustainability, CSR, and responsible tourism, idiosyncrasies unique to the environmental and socio-economic characteristics of the region, as well the specific industry focus (i.e. accommodation), have a significant bearing on how these concepts are understood by industry practitioners. This not only calls for caution in the way technical academic terms are interpreted and utilised during field research, especially in Global South contexts, but also for the need to ascertain how these concepts are understood in the interpretation of research data and results.

REFERENCES

- Alfreds, D. (2018). *Here are the SA cities facing the biggest threat from climate change*. [Online], Available at: <https://www.news24.com/Green/News/here-are-the-sa-cities-facing-the-biggest-threat-from-climate-change-20180619> [Accessed 29 August 2019].
- Andersson, I. & James, L. (2018). Altruism or entrepreneurialism? The co-evolution of green place branding and policy tourism in Växjö, Sweden. *Urban Studies*, 55(15):3437–3453.
- Bakker, M. (2019). A conceptual framework for identifying the binding constraints to tourism-driven inclusive growth. *Tourism Planning & Development*, 16(5):575–590.
- Barnett, M.L. (2019). The business case for corporate social responsibility. *Business & Society*, 58(1):167–190.
- Barr, S., Gilg, A. & Shaw, G. (2011). Helping people make better choices: Exploring the behaviour change agenda for environmental sustainability. *Applied Geography*, 31(2):712–720.
- Booyens, I. (2010). Rethinking township tourism: Towards responsible tourism development in South African townships. *Development Southern Africa*, 27(2):273–287.

- Burrai, E., Buda, D.-M. & Stanford, D. (2019). Rethinking the ideology of responsible tourism. *Journal of Sustainable Tourism*, 27(7):992–1007.
- Burton, D. (2000). Sampling strategies in survey research. In D. Burton (Ed.), *Research Training for Social Scientists* (pp. 307–319). London: SAGE Publications Ltd.
- Camilleri, M.A. (2016). Responsible tourism that creates shared value among stakeholders. *Tourism Planning & Development*, 13(2):219–235.
- Carroll, A.B. (1979). A three-dimensional conceptual model of corporate performance. *Academy of Management Review*, 4:497–505.
- Carroll, A.B. (1999). Corporate social responsibility: Evolution of a definitional construct. *Business & Society*, 38(3):268–295.
- Caruana, R., Glozer, S., Crane, A. & McCabe, S. 2014. Tourists' accounts of responsible tourism. *Annals of Tourism Research*, 46:115–129.
- Chen, H., Bernard, S. & Rahman, I. (2019). Greenwashing in hotels: A structural model of trust and behavioral intentions. *Journal of Cleaner Production*, 206:326–335.
- Chuang, S.-P. & Huang, S.-J. (2018). The effect of environmental corporate social responsibility on environmental performance and business competitiveness: The mediation of green information technology capital. *Journal of Business Ethics*, 150(4):991–1009.
- Clark, J.M. (1926). *Social control of business*. Chicago: University of Chicago Press.
- Cohen, M. & Burkhardt, P. (2015). *Six ways SA is tackling its electricity crisis*. [Online], Available: <https://www.fin24.com/Economy/Eskom/Six-ways-SA-is-tackling-its-electricity-crisis-20150908> [Accessed 29 August 2019].
- Coleman, K., Murdoch, J., Rayback, S., Seidl, A. & Wallin, K. (2017). Students' understanding of sustainability and climate change across linked service-learning courses. *Journal of Geoscience Education*, 65(2):158–167.
- Cooper, C.P. & Ozdil, I. (1992). From mass to "responsible" tourism: the Turkish experience. *Tourism Management*, 13(4):377–386.
- Drucker, P.F. (1984). The new meaning of corporate social responsibility. *California Management Review*, XXVI(2):53–63.
- Duarte, A.P., Mouro, C. & Das Neves, J.G. (2010). Corporate social responsibility: Mapping its social meaning. *Management Research*, 8(2):101–122.
- Elkington, J. (1998). *Cannibals with forks : the triple-bottom-line of 21st century business*. Capstone. Oxford, United Kingdom.
- Elo, S. & Kyngäs, H. (2008). The qualitative content analysis process. *Journal of Advanced Nursing*, 62(1):107–15.
- Falagas, M.E., Pitsouni, E.I., Malietzis, G.A. & Pappas, G. (2008). Comparison of PubMed, Scopus, Web of Science, and Google Scholar: strengths and weaknesses. *The FASEB Journal*, 22(2):338–342.
- Fatima, J.K., Ghandforoush, P., Khan, M. & Mascio, R. Di. (2019). Mobile learning adoption for tourism education in a developing country. *Current Issues in Tourism*, 22(4):420–427.
- Fennell, D.A. (2008). Responsible tourism: A Kierkegaardian interpretation. *Tourism Recreation Research*, 33(1):3–12.
- Fioramonti, L. (2015). *Water shortages about to put load-shedding in the dark*. [Online], Available: <https://governanceinnovation.org/water-shortages-about-to-put-load-shedding-in-the-dark-business-day-05-05-2015/> [Accessed 29 August 2019].
- Freeman, I. & Hasnaoui, A. (2011). The meaning of corporate social responsibility: The vision of four nations. *Journal of Business Ethics*, 100:419–443.
- Frey, N. & George, R. (2010). Responsible tourism management: The missing link between business owners' attitudes and behaviour in the Cape Town tourism industry. *Tourism Management*, 31(5):621–628.
- Friese, S. (2014). *Qualitative data analysis with ATLAS.ti*. 2nd ed. Los Angeles, Washington DC: SAGE.
- Hassan, S.S. (2000). Determinants of market competitiveness in an environmentally sustainable tourism industry. *Journal of Travel Research*, 38(3):239–245.
- Idahosa, L.O. (2018). Environmental sustainability and tourism accommodation in South Africa : The managers' perspective. *EuroEconomica*, 37(1):259–275.
- Kimbu, A. & Tichaawa, T.M. (2018). Sustainable development goals and socio-economic development through tourism in Central Africa: Myth or reality? *GeoJournal of Tourism and Geosites*, XI(23):780–796.
- Klein, R.A. (2011). Responsible cruise tourism: Issues of cruise tourism and sustainability. *Journal of Hospitality and Tourism Management*, 18(1):107–116.
- Kolk, A. (2016). The social responsibility of international business: From ethics and the environment to CSR and sustainable development. *Journal of World Business*, 51(1):23–34.
- Krippendorff, J. (1987). Ecological approach to tourism marketing. *Tourism Management*, 8(2):174–176.
- Leal Filho, W., Vargas, V.R., Salvia, A.L., Brandli, L.L., Pallant, E., Klavins, M., Ray, S., Moggi, S., et al. (2019). The role of higher education institutions in sustainability initiatives at the local level. *Journal of Cleaner Production*, 233:1004–1015.
- Leuenberger, D.Z. (2007). Introduction - signs of the times: Environmental sustainability, citizens, leadership, and social justice. *Administrative Theory and Praxis*, 29(3):370–374.
- Mathew, P. V. & Sreejesh, S. (2017). Impact of responsible tourism on destination sustainability and quality of life of community in tourism destinations. *Journal of Hospitality and Tourism Management*, 31:83–89

- Matten, D. & Moon, J. (2008). "Implicit" and "explicit" CSR: A conceptual framework for a comparative understanding of corporate social responsibility. *Academy of Management Review*, 33(2):404–424.
- Mays, N. & Pope, C. (2000). Qualitative research in health care. Assessing quality in qualitative research. *BMJ (Clinical research ed.)*, 320(7226):50–2.
- Mohr, L.A., Webb, D.J. & Harris, K.E. (2001). Do consumers expect companies to be socially responsible? The impact of corporate social responsibility on buying behavior. *The Journal of Consumer Affairs*, 35(1):45–72.
- Morelli, J. (2011). Environmental sustainability: A definition for environmental professionals. *Journal of Environmental Sustainability*, 1(1):1–10.
- Musavengane, R. (2019). Small hotels and responsible tourism practice: Hoteliers' perspectives. *Journal of Cleaner Production*, 220:786–799.
- Nagendra, H. (2018). The global south is rich in sustainability lessons that students deserve to hear. *Nature*, 557(7706):485–488.
- Nolet, V. (2015). *Educating for sustainability*. Routledge. London, United Kingdom.
- Parguel, B., Benoît-Moreau, F. & Larceneux, F. (2011). How sustainability ratings might deter 'greenwashing': A closer look at ethical corporate communication. *Journal of Business Ethics*, 102(1):15–28.
- Peattie, K. & Peattie, S. (2009). Social marketing: A pathway to consumption reduction? *Journal of Business Research*, 62:260–268.
- Ramus, C.A. & Montiel, I. (2005). When are corporate environmental policies a form of greenwashing? *Business & Society*, 44(4):377–414.
- Saarinen, J. (2018). Beyond growth thinking: the need to revisit sustainable development in tourism. *Tourism Geographies*, 20(2):337–340.
- Schreier, M. (2012). *Qualitative content analysis in practice*. Los Angeles: SAGE Publications Ltd.
- Spence, L.J. (2016). Small business social responsibility. *Business & Society*, 55(1):23–55.
- Tang, Y.H., Amran, A. & Goh, Y.N. (2014). Environmental management practices of hotels in Malaysia: stakeholder perspective. *International Journal of Tourism Research*, 16(6):586–595.
- Tichaawa, T.M. (2017). Business tourism in Africa: The case of Cameroon. *Tourism Review International*, 21(2):181–192.
- van der Merwe, M. & Wöcke, A. (2007). An investigation into responsible tourism practices in the South African hotel industry. *South African Journal of Business Management*, 38(2):1–15.
- Williams, S. & Schaefer, A. (2013). Small and medium-sized enterprises and sustainability: Managers' values and engagement with environmental and climate change issues. *Business Strategy and the Environment*, 22(3):173–186.
- Wright, C.Y., Engelbrecht, F. & Sweijd, N. (2015). *The three culprits behind South Africa's weird weather patterns*. [Online], Available: <http://theconversation.com/the-three-culprits-behind-south-africa-s-weird-weather-patterns-50613> [Accessed 29 August 2019].
- Writer, S. (2019). *New report shows alarming weather changes in South Africa*. [Online], Available: <https://businesstech.co.za/news/lifestyle/315344/new-report-shows-alarming-weather-changes-in-south-africa/> [Accessed 29 August 2019].
- Yu, L., Wang, G. & Marcouiller, D.W. (2019). A scientometric review of pro-poor tourism research: Visualization and analysis. *Tourism Management Perspectives*, 30:75–88.
- *** Cape Town Declaration. (2002). *Responsible Tourism in Cape Town*. Cape Town.
- *** Cape Town Tourism. (2017). *Annual report: Looking back and looking forward*. Cape Town.
- *** Clarivate. (2019). *Web of Science*. [Online], Available: <http://molecular-cancer.biomedcentral.com/articles/10.1186/1476-4598-12-41>.
- *** Department of Environmental Affairs and Tourism. (2002). *Responsible Tourism Manual for South Africa*. South Africa: Department for Environmental Affairs and Tourism.
- *** European Commission. (2001). *Green paper: Promoting a European framework for corporate social Responsibility*. Brussels.
- *** Global Compact. (2005a). *What is the UN global compact?* [Online], Available: <https://www.unglobalcompact.org/what-is-gc> [Accessed 24 August 2019].
- *** Global Compact. (2005b). *The ten principles of the UN global compact*. [Online], Available: <https://www.unglobalcompact.org/what-is-gc/mission/principles> [Accessed 24 August 2019].
- *** Google. (2019). *Google Scholar*. [Online], Available: <https://scholar.google.com/> [Accessed 29 August 2019].
- *** Pro-Poor Tourism (PPT). (2002). *What is pro-poor tourism?* [Online], Available: <http://propoortourism.org.uk/pro-poor-tourism> [Accessed 24 August 2019].
- *** United Nations. (2019). *Why does climate change matter?* [Online], Available: <https://www.unenvironment.org/explore-topics/climate-change/why-does-climate-change-matter> [Accessed 19 August 2019].
- *** World Commission on Environment and Development (WCED). (1987). *Brundtland report: Our common future*.
- *** World Tourism Organisation (UNWTO). (2016). *The tourism sector and the sustainable development goals: Responsible tourism, a global commitment*. Spain.
- *** World Tourism Organization. (1998). *Sustainable tourism development: Guide for local authorities on developing sustainable tourism*. World Tourism Organization.

PERIPHERAL TOURISM TRAJECTORIES: EVIDENCE FROM THE KING SABATA DALINDYEBO MUNICIPALITY, SOUTH AFRICA

Christian M. ROGERSON *

University of Johannesburg, School of Tourism & Hospitality,
College of Business & Economics, Johannesburg, South Africa, email: crogerson@uj.ac.za

Citation: Rogerson C. M., (2019). PERIPHERAL TOURISM TRAJECTORIES: EVIDENCE FROM THE KING SABATA DALINDYEBO MUNICIPALITY, SOUTH AFRICA. *GeoJournal of Tourism and Geosites*, 26(3), 974–992. <https://doi.org/10.30892/gtg.26323-411>

Abstract: Peripheral tourism is a major theme for tourism scholars. This article contributes to the expanding international debates and writings surrounding ‘tourism in peripheries’ and of peripheral tourism development. It applies a longitudinal research approach towards the evolution of tourism in one particular marginal tourism region in the global South. The geographical focus is South Africa where the space economy exhibits a core-periphery structure. The paper traces the trajectory of tourism development which has occurred in one peripheral region of the country. The case study is of King Sabata Dalindyebo Local Municipality in Eastern Cape province. This is an area of particular interest as it incorporates much of the territory that was the former Transkei homeland. The discussion shows that the historical growth of different forms of tourism in this municipality exhibits marked differences between its inland and coastal areas. Importantly, the contemporary tourism economy of this peripheral region shows signs of serious decline despite tourism being acknowledged as one of key drivers for local development.

Key words: Peripheral tourism, historical tourism, Transkei Homeland, South Africa

* * * * *

INTRODUCTION

Questions surrounding ‘peripherality’ and the development of tourism in ‘peripheral regions’ continue to attract a vibrant scholarship (Hohl & Tisdell, 1995; Wanhill, 1997; Brown et al., 2000; Moscardo, 2005; Chaperon & Bramwell, 2013; Pezzi, 2017a; Pezzi & Urso, 2017; Salvatore et al., 2018; Pezzi et al., 2019). In theories of regional or spatial development the term ‘periphery’ has become synonymous with localities that are ‘less developed’, ‘underdeveloped’ or ‘distressed’ as compared to the state of development of more prosperous ‘core’ regions (Pike et al., 2006, 2015; Rogerson, 2015). Pezzi & Urso (2016, 2017) highlight both the opportunities and constraints of peripherality with policy suggestions for overcoming marginalisation challenges through a search for new paths of resilience in peripheral regions. For tourism scholars the

* Corresponding author

concept of a 'core-periphery' dichotomy in space economies remains at the centre of discussions about tourism as a potential vehicle for encouraging economic growth and employment opportunities in peripheral regions and for breaking down existing spatial structures (Christaller, 1964; Müller & Jansson, 2007; Hall, 2013). Much literature about tourism in peripheral regions directly focuses on tourism's role (or potential) for generating economic growth, enterprise development, and livelihood improvements (Keller, 1987; Brouder, 2013). Other key research foci relate to management issues, entrepreneurship and of niche tourism promotion (Moscardo, 2005; Chaperon & Bramwell, 2013; Dinis & Krakover, 2016; Pezzi, 2017a, 2017b; Salvatore et al., 2018; Pezzi et al., 2019). This paper contributes to these expanding international debates and writings surrounding 'tourism in peripheries' and of peripheral tourism development. More specifically, it seeks to offer fresh insight into peripheral tourism by adopting a longitudinal approach towards the evolution of tourism in one particular marginal tourism region in the global South. Arguably, the impacts of 'peripheralisation' processes are most clearly visible in remote, isolated or 'excluded' areas of national space economies (Pezzi, 2017a; Lang & Görmar, 2019).

The geographical setting for this investigation is South Africa which manifests a distorted core-periphery structure with massive, historically structured and deep-seated unevenness in patterns of spatial development (Todes & Turok, 2018). In South Africa, as in many parts of Europe, tourism is viewed as a vehicle for local and regional development and around this theme there are several relevant existing academic works (Rogerson, 2014a, 2015; Nel & Rogerson, 2016; Rogerson & Rogerson, 2019a).

The objective in this paper is to trace the pathway or trajectory of tourism development which has occurred in one peripheral region of the country. The specific regional focus is upon what is now termed the King Sabata Dalindyebo Local Municipality, an area which is of particular interest as it incorporates much of the territory that was the former Transkei Homeland. Three sections of discussion and analysis are presented. First, a background sketch is given of the case study region to demonstrate the characteristics of this peripheral area of South Africa. Second, drawing upon a range of archival source material, a longitudinal approach is taken to track the evolution of tourism beginning in the colonial period and continuing to the period of democratic change in 1994. The third section shifts to investigate the state of the area's contemporary tourism economy and reveals the stagnant character of peripheral tourism.

RESEARCH CONTEXT

The King Sabata Dalindyebo Local Municipality (KSDM) is part of the O.R. Tambo District Municipality (DM) in Eastern Cape province. It is the largest of the five municipalities that comprise O.R. Tambo DM accounting for a quarter of its geographical area. The KSD municipality comprises a major section of what was the former Transkei Bantustan which was constituted in the apartheid period.

The KSD municipality was formed in 2000 before the local government elections as a result of the merger of the Mqanduli and Mthatha Transitional and Rural Councils. The majority of the population resides in rural settlements; the two largest centres are Mqanduli and Mthatha, which was formerly named Umtata until March 2004 (Ngwira, 2011). The KSD Municipality also incorporates a small section of the Wild Coast as the mandate of the municipality stretches to include the coastal tourist hub of Coffee Bay and the iconic visitor attraction of the Hole in the Wall (Fig 1). The municipality has a total population estimated (2016) as 490 000 (99.1 percent described as Black African) of which 310 000 are classed as living in rural traditional settlements (Eastern Cape Socio-Economic Consultative Council, 2017). A gender imbalance exists with 54 percent of the

population female which is a reflection of the area's history as a cheap labour reservoir for male migrant workers employed elsewhere in South Africa. The main urban centre of Mthatha has a population of about 150 000 albeit it caters for the needs of over 1.5 million people who live within a 50km radius of the town (Dzinotyiweyi, 2009). Mthatha is one of South Africa's urban centres where a major section of its residents are accommodated in characteristically rural settings (de Witt & Ndzamela, 2018). In functional terms Mthatha is a regional powerhouse as it serves as an economic and social focus for the functionally lower order settlements, both the small towns and their surrounding rural communities (O.R. Tambo District Municipality, 2017).

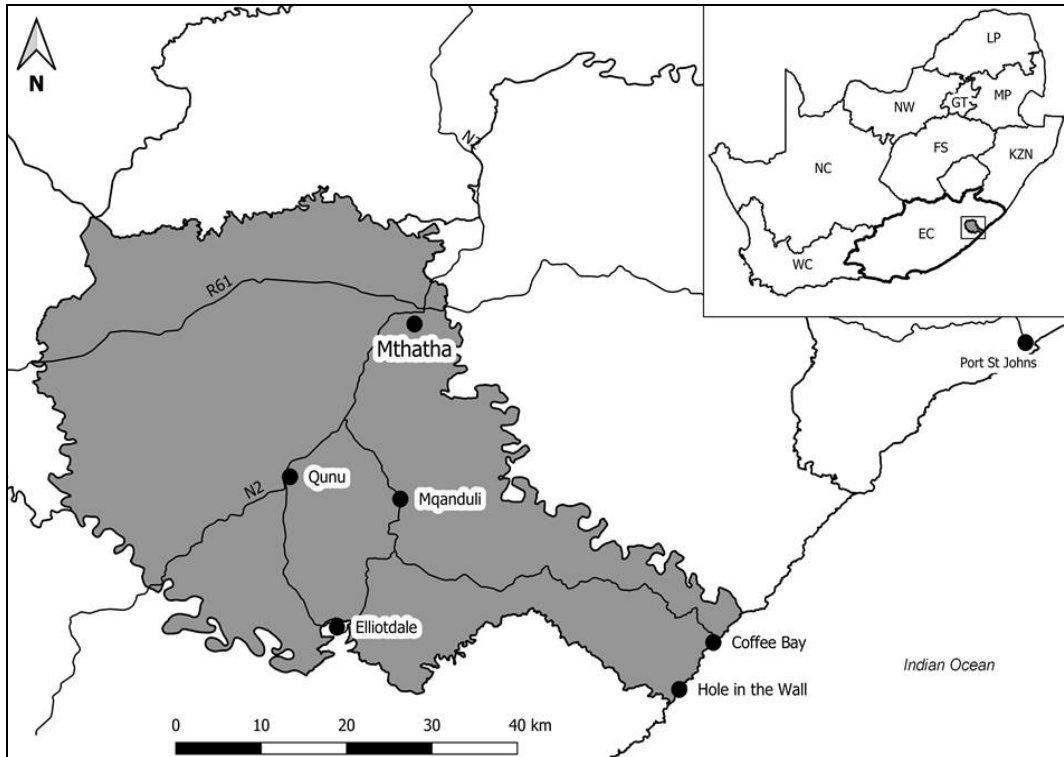


Figure 1. The Location of King Sabata Dalindyebo Municipality, South

In respect of development indicators it is important to appreciate that KSDM would be classed as one of South Africa's most economically distressed and marginalized areas. Widespread poverty exists across the KSDM as well as the O.R. Tambo DM which is one of South Africa's municipalities recording a declining district economy (O.R. Tambo District Municipality, 2017). For Mthatha Harrison (2008) and Tsheleza et al. (2019) state that two-thirds of its citizens live in poverty and as much as 52 percent of them are formally unemployed. Service levels for households and infrastructure are major challenges. De Witt & Ndzamela (2018: 4) provide a profile for 2016 for the district which reveals only 15.7 percent of local households with indoor water access, 36.7 percent with flush toilet access but with 84.5 percent of households having electricity access, the latter lower than the national South African average. It is argued that the spatial extent of urban sprawl outside the formal urban boundary onto traditional land is one key factor constraining improved service delivery (de Witt & Ndzamela, 2018).

Harrison (2008) draws attention to historical factors that explain the municipality's current infrastructural challenges. It is argued the town suffers from a legacy of "historical mismanagement" and that the bulk infrastructure network "was developed for 'the colonial Mthatha of a 100 years ago' and cannot meet the demands of the current population" (Harrison, 2008: 26). Mzamo (2018: 79) records that today Mthatha is overcrowded and has "relapsed into a town of potholes, out-dated sewerage systems, electricity outages and dilapidated buildings". Residents often have to endure lengthy periods without water and with sewerage spills and uncollected garbage a constant sight (Dzinotyiweyi, 2009). Solid waste management is emerging as a major environmental hazard (Tsheleza et al., 2019). Ngwira (2011: 51) adds the impact of HIV/Aids is a further issue "of major concern within the Municipality".

A diagnostic research investigation produced by the Eastern Cape Socio-Economic Consultative Council (2017) pointed to 12.4 percent of the municipal population as infected with HIV. In terms of the local economy this municipality was negatively impacted by 1994 democratic transition and the re-incorporation of Transkei into South Africa (Siyongwana, 2005). Umtata lost its status as a preferred 'growth point' for decentralization of manufacturing in terms of changes in location incentives enacted in 1991. By 1994 it had lost also its former capital city function and later suffered further misfortune in the decision to locate the function of provincial capital of Eastern Cape at Bisho (Siyongwana, 2009). A rebound in the local economy began from 2000 when Mthatha secured its role as administrative centre for the O.R. Tambo DM as well as being the administrative heart for KSDM. The town has only a small manufacturing base although there are announced plans for promoting new agro-industrial enterprises at the Wild Coast special economic zone in Mthatha (Ngcukana, 2018). The ambitious plans for this zone coincide with aspirations of the KSD municipality "to become the first rural metro in the country by 2021/22 and to build a new town in Coffee Bay with a harbour" (Ngcukana, 2018).

The contemporary (formal) economy of KSDM is dominated by government services, finance and trade (de Witt and Ndzamela, 2018). For Mthatha Harrison (2008: 26-27) describes the existence of "a structurally unequal economy" with a small number of large firms dominating the formal economy, a structure that "encourages massive leakages from the town". Beneath the formal economy is an extensive informal economy within which micro-enterprises compete against each other in "the lowest ends of the market owing to their inability to compete against large established firms" (Harrison, 2008: 27). In light of the fragile state of economic development the making of place-based initiatives is urgent for sustainable development of KSDM as a whole and of Mthatha in particular. The capacity for developing such initiatives is, however, constrained. De Witt & Ndzamela (2018: 7) assessed the municipality's institutional capacity and concluded "it to be seriously lacking". Of particular concern is that in relation to planning for local economic development (LED) the research study by Mbontsi (2008: xi) revealed "the municipality does not understand the concept of LED" and as an outcome "LED is not living up to expectations in the area". This said, in many spheres of its mandate the municipality has good plans in theory albeit "the municipality lacks the people with the competencies to implement" (de Witt & Ndzamela, 2018: 7). In turn this results in ineffective use of resources and a recurrent crisis in municipal governance (Msi, 2009). It is against this backdrop that attention turns to examine one of the identified potential drivers for growth and poverty alleviation in KSDM, namely the tourism sector (King Sabata Municipality, 2016, 2019). The next section turns to the evolutionary pathway of tourism in this region.

THE HISTORICAL DEVELOPMENT TRAJECTORY OF TOURISM

The historical development of tourism in what is now KSDM remains part of the unwritten and so far little researched tourism history of South Africa (Grundlingh, 2005; Rogerson, 2017; Rogerson & Rogerson, 2018, 2019b; Rogerson, 2019; Sixaba & Rogerson, 2019). From scattered available information are certain indications of early tourism development in this area. Originally, what is today Mthatha was built as a white settlement in the mid-1800s, a buffer between warring African communities over land disputes. Subsequently, the town became a significant logistical hub in the early days of trade and travel in South Africa (de Witt & Ndzamela, 2018).

For 1920 there is clear evidence that the settlement of Umtata was attracting a flow of travellers in need of commercial accommodation. The Illustrated South African Hotel Guide for 1920 lists the existence of three hotels in Umtata, namely the Imperial, the Grosvenor and Royal (The Union Publishing Agency 1921: 222). By 1935 Umtata was the terminus of the railway line from East London and an important trading centre for the Transkeian territories. A marketing brochure produced in 1935 by the East London publicity association describes the town as the “Administrative Capital of the Transkeian territories” and geographically situated “amidst fine mountain scenery” and enjoying “an equable climate” (East London Publicity Association, 1935: 92). In terms of further publicizing the town for visitors the guide stated as follows: “Umtata is rich in history, closely bound up with that of the troublous early days in the Transkei, and with devoted missionary enterprise” (East London Publicity Association, 1935: 92).

Further, it was pointed out that the town was “romantic in history” and “situated in the heart of a native population of well over a million souls” (East London Publicity Association, 1935: 95). A 1936 national guide describes the town as “capital of Tembuland situated on the banks of the Umtata River near Umtata Falls” (South African Railways and Harbours, 1936: 192). It recorded the three same established hotels – Grosvenor Hotel, Hotel Imperial and Royal Hotel – each of which charged between 10s 6d and 12s 6d per day for accommodation (South African Railways and Harbours, 1936). At the coast whilst there existed no formal accommodation establishments the beginnings of Coffee Bay as a leisure destination were marked by the appearance of holiday cottages during the 1940s (Ashley & Ntshona, 2003; Wildman, 2005). For travellers detraining at Umtata, tourism marketing material produced in 1937 for South African railways characterized it as “the gateway to a region which is one of the most beautiful in Southern Africa” (Carlyle-Gall, 1937: 75). In detail its attractions were described as follows: “In this entrancing land live, in quaint primitiveness, over 1,000,000 natives. The impressions which the traveler of this modern age gains while touring so unique a territory must surely come to him as a revelation. The South African, accustomed as he is to seeing the native as a labourer, in European clothes of sorts, endeavouring to adjust himself to a complex – and what is to him a totally foreign – environment, will observe, almost at every turn, some new aspect of untrammelled and picturesque Bantu life which will increase his understanding of this interesting human type. To the overseas visitor, inured to the day-and-night clamour of incessant traffic and to the seething population of a crowded capital of the Northern Hemisphere, a journey in this strange and primeval land is still more impressive. The markedly progressive towns and villages, collectively of only some 17,000 Europeans, are in striking contrast to their surroundings, and once he departs from these centres of the white race, the sightseer leaves civilization behind and finds himself in a region over which reigns the age-less peace of Africa” (Carlyle-Gall, 1937: 75).

The appeal of the Transkei was viewed as particularly strong for international tourists visiting South Africa. Just prior to the outbreak of the Second World War it was observed: “It is the unique privilege of the visitor to South Africa to be able, as it were,

to step from the pulsating twentieth-century scene into a vastly different world – the ancestral domain of the native. And in the Transkeian Territories human society in its very beginning is to be seen in the weirdly-romantic native reserves” (Carlyle-Gall, 1937: 77). Further later publicity material produced by South African Railways Tourist Office (1949) and targeted mainly at potential international travellers to South Africa continued to emphasise the “primitive” attractions and customs of the people of the “Native Territories”. Indeed, in 1949 the Transkei was described as a “singularly rich field for the searcher after the primitive” (South African Railways Tourist Office 1949: unnumbered page 2). The following description was offered to lure the curious international tourist: “Here the Native goes about his daily round in much the same manner as he did before the coming of the white man. Tribal customs are observed with all their colourful solemnity; periodical dances are staged with vigorous enthusiasm; and even in respect of simple domestic duties the ways of the Native are full of quaintness and interest to folk accustomed from infancy to European ideas” (South African Railways Tourist Office 1949: unnumbered page 2).

During the apartheid period national government began to express growing interest in the potential for encouraging tourism development in the so-termed Bantustans or Homelands. In particular, mounting policy concern occurred in the 1960s. It was inseparable from the imperative of providing some façade of economic legitimacy to national government planning of these spaces as ‘separate’ from and potentially ‘independent’ of the space of so-termed ‘White’ South Africa. In 1963 Transkei assumed the status of a ‘self-governing’ territory with the powers of the Transkeian General Council (or Bunga), endowed with a new Constitution, expanded as it became the Transkei Legislative Assembly. From the limited available source material on accommodation there are signals of some growth in the tourism economy of what would become KSDM. The 1965 national guide lists four hotels in Umtata, *viz.*, the Grosvenor (46 rooms 5 with private bath), the Imperial (40 rooms 8 with private bath), the Royal (53 rooms 2 with private bath) and - the largest - the newly established Savoy (92 rooms and 44 with private bath) (Hotel Guide Association, 1965). In addition, the 1965 Hotel Guide lists the 10 room Union Hotel in Mqanduli; no hotel establishments were given for the coastal area (Hotel Guide Association, 1965). By 1972, however, the national Hotel Guide records the Union at Mqanduli as well as five hotels in Umtata, with the most recent addition being the unregistered 40 room Transkei Hotel (Hotel Board South Africa, 1972). Further, the same guide lists two unregistered hotel establishments now operating at Coffee Bay, those being the 42 room Lagoon Hotel and the 40 room Ocean View Hotel. Wildman (2005: 88) argues that during the 1960s Coffee Bay began to attract “a lot of domestic tourists”. During the early 1970s Coffee Bay even could be styled as “a flourishing holiday village” that was an increasing popular focus for the growing market of (white) domestic tourism under apartheid (Wildman, 2005: 96). Indeed, as part of South Africa’s pleasure periphery, Wildman (2005: 96) observes that “Coffee Bay had enjoyed a reputation of being a ‘trouble free’, ‘normal’ and ‘uncomplicated’ destination – a place where white South Africans really could be free”.

A major turning point in the trajectory of KSDM as a tourism area came with Transkei independence. Notwithstanding widespread opposition expressed towards the implementation of separate development and that independence on 26 October 1976 was seen as “illegitimate” and “white-imposed from Pretoria” (Streek & Wicksteed, 1981: 7) Transkei became the first of four of South Africa’s ten Bantustans to accede to ‘independence’. Much window-dressing was necessary however, to make Umtata – along with other independence capitals such as Mmabatho, Thohoyoandou and Bisho – an international showcase for Bantustan development (Siyongwana, 2009: 293). During the

apartheid period tourism developers and Bantustan governments were facilitated to take advantage of the status of 'independence' as a means to circumvent South African government restrictions towards what was deemed as such 'morally dubious' activities as gambling, inter-racial relations and pornography. The Transkei, as with other subsequent 'independent' Bantustans, "provided the ideal location for white South Africans to indulge themselves" (Wildman, 2005: 86). The first casino/resort complex to be launched in Transkei by Holiday Inn opened its doors for pleasure seekers at Mazamba which adjoins the Natal South Coast in December 1981. It was targeted especially at white domestic tourists as well as the day visitor market from Durban (Crush & Wellings, 1983).

At this time the Transkei was a region newly attracting the investment interest of South Africa's major hotel enterprises, several of which examined opportunities for casino development mainly in the territory's coastal areas. That said, it was reported that during 1980 the Southern Sun group were exploring potential hotel sites across Transkei including an investigation of the possibilities of developing "a complex overlooking the sprawling Mtata Dam, 6 km from Umtata" (*Rand Daily Mail*, 24 July 1980). New investment began to flow into the hotel economy of Umtata as shown by the opening of the 117 bed Holiday Inn which became the town's largest hotel. The 1981 tourism guide identifies, however, few leisure activities for visitors to Umtata. The only exceptions were of "excellent waters for trout fishing" in the local area (Republic of Transkei, 1981: 34) as well as sport fishing for eels along the Umtata river. Nevertheless, the possibilities for enjoying a leisure experience in Umtata were marketed in promotional material issued by the town's hotels. The Transkei Hotel, for example, proclaimed it was where "international travelers meet" and that "For those who feel romantic we have the Rooftop Terrace. What better way to spend a quiet evening relaxing and watching the sun sinking slowly over the lush greenery that is Transkei" (Republic of Transkei, 1981: 41).

Notwithstanding its limited attractions for the leisure traveler new possibilities emerged with independence for Umtata to expand its economy of business tourism. With accession to 'independence' Umtata acquired the status as well as some of the associated trappings of a 'national' capital city (Siyongwana, 2009). Opportunities opened up here for the further flow of business tourists including of 'international business tourists' through the steady flow of diplomats and government officials from Pretoria. Arguably, following independence, business tourism must have expanded in significance associated with the growth of government administrative functions (Siyongwana, 2009) and thus a boost overall to Umtata's tourism local economy. Umtata was the road and air transportation focus for Transkei as well as the hub of Transkei Airways which operated 20 flights a week between Johannesburg and Umtata.

By the early 1980s further promotion was undertaken of Transkei's potential as a leisure tourism destination. Ashley & Ntshona (2003: 8) observed that "tourism came to be seen as a source of income" and planning for the coastal areas was based on the identification of several key nodes, of which Coffee Bay was one, and leaving the rest of the coastline in its natural state. In 1981 the Transkei Department of Planning and Commerce issued an official visitor guidebook which stated as follows: "Transkei is a country of considerable beauty ranging from indigenous forests in its inland mountain areas to a unique coastline which is unequalled for its unspoilt natural beauty. The policy of my Department is to preserve the beauty of the coastline and at the same time to encourage tourist development in selected areas" (Republic of Transkei, 1981: 2). In what is now KSD the major leisure tourism developments occurred not in Umtata but instead at the coastal areas around Coffee Bay. The 1981 guide listed still only two hotels - the Ocean View and the Lagoon Hotel - at what was described now as "the picturesque resort" of Coffee Bay (Republic of Transkei, 1981: 44). In its advertising the

Ocean View Hotel provides details of its amenities as well as core attractions for tourists that include “private beach, excellent surfing, surf and rock fishing” as well as tennis court, full sized snooker table and evening relaxation at the hotel’s bar.

Using oral testimonies and archival research Wildman’s (2005: 87) rich research at Coffee Bay documents that whilst ‘independence’ for Transkei “may have created new forms of tourism opportunities for the black government, it at the same time upset the region’s traditional tourist base”. Coastal tourism proprietors reported that occupancy rates dropped dramatically following ‘independence’ as the core base of regular white domestic tourists was nervous if not ‘scared’ of holidaying in an area with a black government. The forcing out of white hotel owners after the black government came to power reduced management capacity and standards as by 1982 the two hotels had been taken over by the Transkei Development Corporation with limited managerial capacities (Wildman, 2005: 89). Nevertheless, the main reason for the collapse in Coffee Bay tourism was the decline of essential services including of a daily bus service that formerly ferried basic supplies to Coffee Bay from Umtata. The situation at Coffee Bay worsened throughout the 1980s especially so following the first military coup of September 1987. A second attempted counter coup was accompanied by attacks both on the hotels and tourists. The consequences of these events for the two Coffee Bay hotels were disastrous. As chronicled by Wildman (2005: 95) “frightened South African holidaymakers cancelled bookings and began staying away in droves”. Inevitably, with the rapid hollowing out of Coffee Bay’s tourism economy both hotels were forced to close operations: “first the Lagoon, which closed not long after the coups, and then the Ocean View in 1989” (Wildman, 2005: 95).

Put simply, Transkei independence was the beginning of the end for the traditional domestic holiday market that had long supported tourism growth at Coffee Bay. The coups immediately and irreparably damaged the region’s image as the perfect pleasure periphery as “white South African tourists looked elsewhere for a new idealized vacationscape to inhabit” (Wildman, 2005: 95). Overall, the ‘innocence’ of Coffee Bay was destroyed and immediately issues of safety became paramount as opposed to traditional established views of Coffee Bay as a ‘value for money’ domestic tourism destination. By the late 1980s Coffee Bay was described as a virtual ghost town. Even into the 1990s amidst signs of political change a sense of danger continued to define tourism in the local area and for Transkei as a whole (Wildman, 2005). Only with the 1994 democratic transition and reintegration of Transkei into South Africa there began to emerge a radical change in the environment for tourism development in what would later become KSDM.

It can be observed that just as independence in 1976 set the conditions for different trajectories for tourism development in Umtata as opposed to Coffee Bay, so also democratic transition introduced fresh possibilities and divergent tourism development pathways for the two centres. In the case of Umtata political change and Transkei’s re-merger into South Africa meant loss of national capital status and being relegated to the reduced role of “a medium regional urban centre” (Siyongwana, 2005: 201). Transkei was subsumed into the new Eastern Cape Province despite lobbying attempts for Umtata to be capital of “a tenth province consisting of the Transkei, the border (part of Ciskei and East London environments) and East Griqualand” (Siyongwana, 2009: 294). The loss of national capital status was compensated for only partially by Umtata becoming the core administrative centre for the King Sabata Local Municipality and the O.R. Tambo District Municipality. As a result of these regional administrative functions Umtata retained some of its potential attractiveness for business tourism, albeit now almost exclusively for regional domestic visitors as opposed to the former flow of ‘international’ business.

The altered prospects for business tourism associated with democratic transition were paralleled by different prospects for leisure tourism in the coastal centre of Coffee

Bay. Although some observers likened the Transkei in 1995 to a 'war zone' which was besieged by 'lawlessness' in terms of violence and escalating crime, reintegration into South Africa at least brought a degree of political stabilization and the end of the era of military coups and counter coups. The Wild Coast Spatial Development Initiative, part of a series of such geographically targeted planning initiatives launched by South Africa's Department of Trade and Industry in the late 1990s, sought to attract new private investment into several coastal zones of the former Transkei, including Coffee Bay (Kepe et al., 2001; Ashley & Ntshona, 2003). Post-1994 witnessed a return of tourism investors into Coffee Bay. As Wildman (2005: 104) reflects whilst "the question of the former homeland's safety kept white South African family vacationers away, it simultaneously began to attract a more adventurous type of tourist – the independent backpacker". Two entrepreneurial local white residents of Coffee Bay observed this change and in 1996 opened the first backpacker hostels. Prior to 1994 backpacker tourism hardly existed in South Africa as the country was shunned by international youth travelers because of the stain of apartheid planning (Rogerson, 2011). Since the democratic transition, however, South Africa has emerged as an increasingly popular destination for international youth travel, especially of backpackers as well as volunteer tourists (Visser, 2004; Rogerson, 2011).

As a result of its attractive natural scenery and beach Coffee Bay and its surrounds became one of the emerging 'hotspots' for international backpackers visiting South Africa (Rogerson, 2011). In addition, high levels of visitation were recorded by communities of international volunteers (Heer, 2007). Essentially, Coffee Bay was re-visioned and repackaged as an "undiscovered, uninhabited paradise to attract a new generation of voyagers to its shores" (Wildman, 2005: 114). In addition, with safety reassured Coffee Bay also was re-discovered by the mainly white South African holidaymaker as an attractive leisure destination as well as becoming a popular destination for day visitors from local urban centres (Mthatha, Elliotdale) in proximity. Argues Wildman (2005: 114) "by the beginning of the new millennium, Coffee Bay, having been rediscovered and reinvented, regained its popularity as the ideal tourist dreamscape".

THE CONTEMPORARY TOURISM ECONOMY

Two sub-sections of discussion are provided concerning the contemporary tourism economy of the municipality. First, an analysis is undertaken of key tourism trends and patterns of tourist trips. Second, the nature of the changing accommodation sector in the municipality is reviewed.

Tourism Trends

Prior to 2000 there is no data available on tourist numbers to the area which could provide a breakdown of the tourism economy in terms of the relative importance of domestic as opposed to international travellers, the different purpose of travel by tourists or of the relative importance of tourism for the local economy of King Sabata Dalindyebo Municipality. From 2001 however a profile of the tourism economy can be gleaned from the unpublished data base of the private sector organization IHS Global Insight. As official data in South Africa is not collected to enable a mapping out of the economic contribution of tourism at a locality scale use is made of this unpublished data base obtainable from IHS Global Insight. The IHS Global Insight data is widely used in local economic development planning in South Africa and observed as applied in the case of KSD municipality in its Integrated Development Planning (King Sabata Municipality, 2016, 2019). IHS Global Insight collates data regularly from a wide range of sources (official and non-government) with the primary data reworked for consistency across variables and by applying national and sub-national verification tests to ensure that the model is consistent for measuring business activity. The data set is

analysed at the scale of the local municipality as a whole and is supplemented by and triangulated with the results of other investigations of tourism in the municipality.

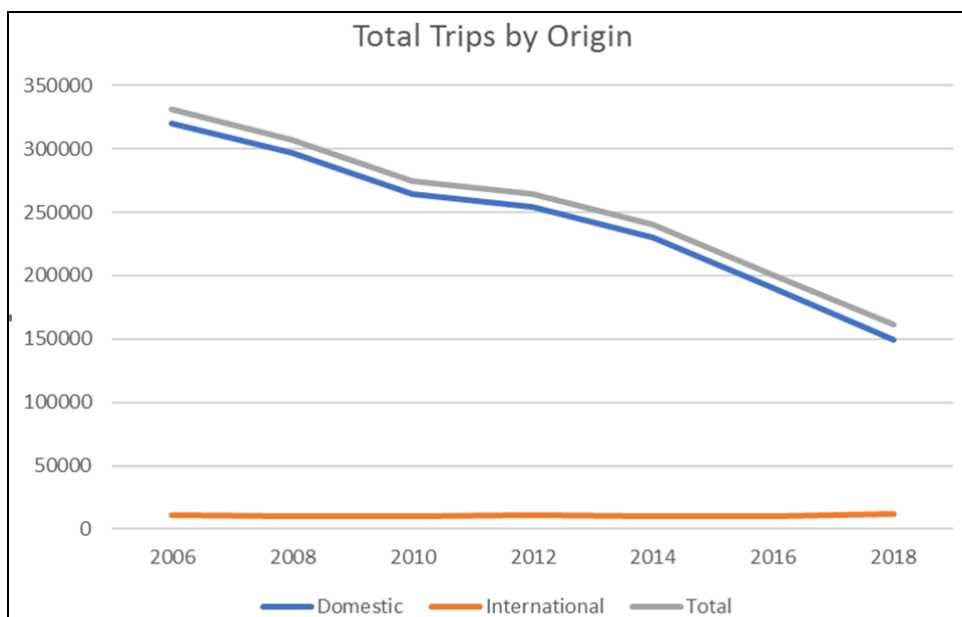


Figure 2. King Sabata Dalindyebo Municipality: Total Trips by Origin 2006-2018
(Source: Based on IHS Global Insight data)

The key finding that emerges from the analysis of the IHS Global Insight data is that of the increasing weakness of the tourism industry across the KSD municipality. During a period marked by a considerable expansion as a whole of the tourism economy for South Africa the performance of the local tourism sector of KSDM has been unpromising. Between 2001 and 2006 in terms of total tourist trips to KSDM there did occur an upturn and expansion from a total of 250 000 trips in 2001 to 332 000 by 2006. This pattern of growth, however, halted by 2006. Since that time there has been an accelerating decline in total tourist trips to the district.

This downturn is particularly marked since the 2008 financial crisis and the subsequent impact of recession and stagnation of South Africa's national economy. The trajectory of decline was little impacted by South Africa's hosting of the 2010 FIFA World Cup which seemingly had minimal impact for this area. By 2018 the number of tourist trips into KSD had fallen further to reach a total of 152 000, the lowest recorded number since data has been available for the municipality.

Figure 2 unpacks also the trip data for domestic as opposed to international travelers. It shows that the major decline in the KSDM tourism trip data is the consequence of the massive downturn in domestic tourism since 2006 and especially since 2010. From a total of 318 000 domestic trips as recorded for 2006 by 2012 the number had fallen to 243 000; by 2018 it was as low as 149 000 trips. It is evident that this downturn is a reflection of the broader national pattern of decline in domestic tourism travel in South Africa especially since 2010. For the KSD municipality this demise in domestic visits means that the relative share of domestic tourist trips is reduced somewhat in the overall total share of trips from 96 percent as of 2006 to 93 percent by 2018. Of note also is that the numbers of international tourist visits is

relatively stable throughout this period. But, in one promising signal for the local economy the number of international trips exhibits a marginal upturn from 2016. By 2018 as a result of the falling numbers of domestic travellers as well as marginal growth in international tourism the share of international trips rises to 7 percent of KSD tourism.

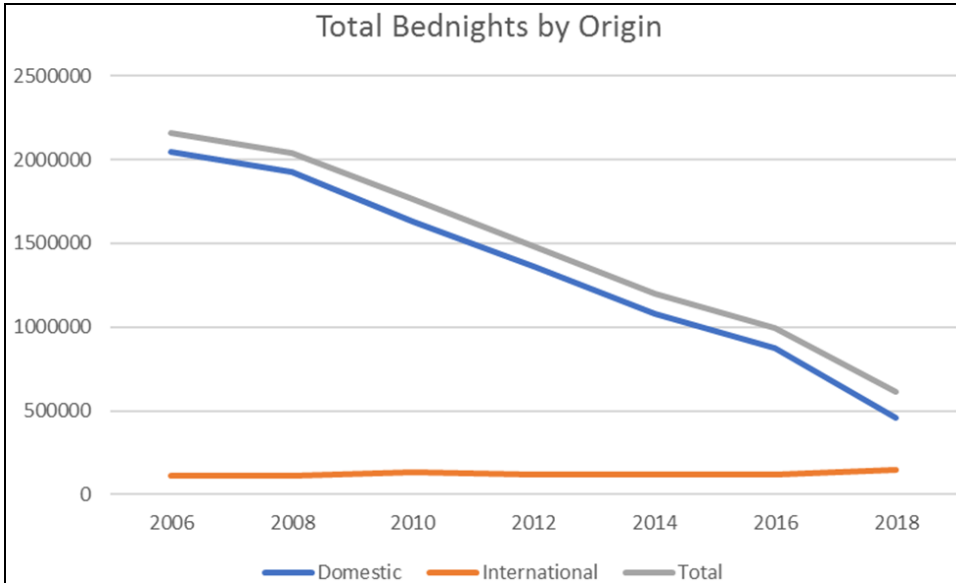


Figure 3. King Sabata Dalindyebo Municipality: Total Bednights by Origin 2006-2018
(Source: Based on IHS Global Insight data)

In parallel with the decline in total trips there has occurred a fall in the total recorded number of bednights, a figure that incorporates both paid bednights in commercial accommodation as well as (mostly) unpaid bednights in non-commercial accommodation which are represented by overnight stays at the homes of friends and relatives (Rogerson, 2018). The information for recorded bednights for KSD once again discloses a tourism economy that is experiencing distress if not absolute decline (Fig. 3). Similar trends to those relating to trip data are in evidence in terms of analyzing bednight data. Overall, there is observed a marked downturn in domestic bednights (a significant proportion of which would be taking place in non-commercial accommodation) albeit on a more positive tone a marginal increase is recorded once again for international bednights with a small upturn in visits between 2016 and 2018. Arguably, given that the majority of these international trips are associated with commercial as opposed to non-commercial forms of accommodation this marginal increase in international bednights is welcomed particularly at Coffee Bay and surrounds which is the core spatial focus for international tourists. Although the observed decline in domestic bednights would impact commercial tourism establishments across the KSDM the most affected area would be Mthatha, the core area for domestic tourists.

Figure 4 shows that in terms of purpose of visit the tourism economy of KSDM is massively dominated by the sector of visiting friends and relatives (VFR) travel. This finding is accounted for in terms of the historical emergence of this area as a cheap labour reservoir for 'White' South Africa and the extensive growth of an economy of circulatory migrants as well as the corresponding splitting of households which would have both an urban and rural 'home' (Rogerson, 2014b). The continued high levels of local

unemployment in the KSD have reinforced this historical arrangement which has remained little altered since democratic transition and the dropping of influx control legislation. The maintenance of split households has the consequence of spurring significant flows of VFR travellers at certain times of year (especially the Christmas/New Year period) for family visits and ceremonies. VFR travel accounts as a whole for nearly 80 percent of trips to KSD with the overwhelming majority of these being domestic trips and occurring in unpaid accommodation (Kyle Business Projects, 2010). It is observed that the VFR travel economy to KSD has been significantly impacted, however, by the downturn and stagnation in South Africa's national economy. Figure 4 shows a remarkable downturn in VFR travel numbers across the period 2006-2018.

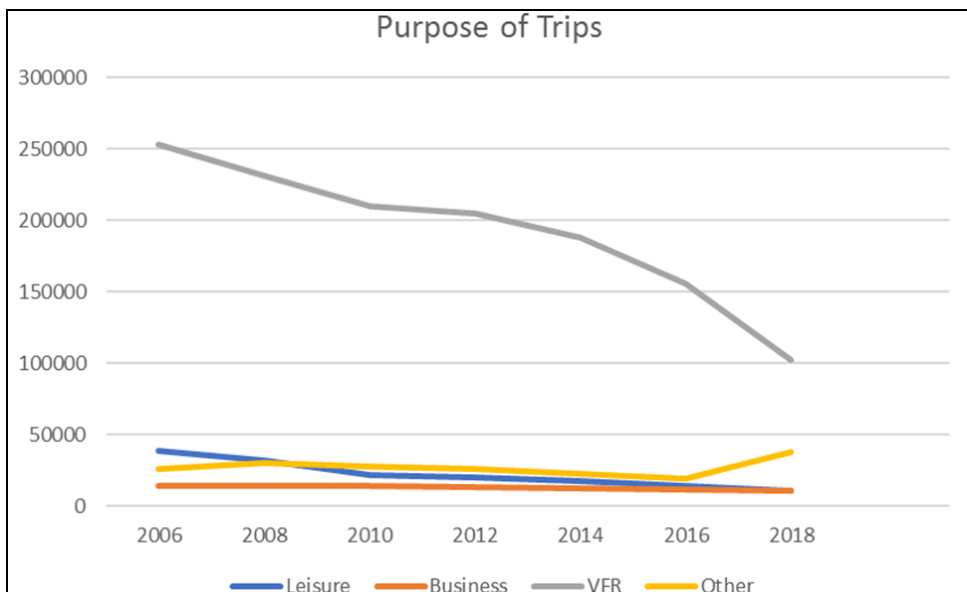


Figure 4. King Sabata Dalindyebo Municipality: Purpose of Travel 2006-2018
(Source: Based on IHS Global Insight data)

In terms of leisure travel there is recorded a fall from 50 600 leisure visits in 2001 to 39 000 by 2006. Across the period 2006-2018 leisure travel has continued to fall such that by 2018 it approximated only 11 000 trips or 5 percent of total trips. The decline in leisure trips to KSD must be read against the opening of major new heritage tourism products in Mthatha and surrounds. The most important is the Nelson Mandela Museum which is conceptualized as comprising three interrelated components namely the Bhunga Building (the management and administrative centre), which is at Mthatha; the Nelson Mandela Youth and Heritage Centre (a community museum) at Qunu; and, the open air museum with the Mandela homestead situated at Mvezo, Mandela's birthplace (Mgxwekwa et al., 2019a, 2019b). The museum's so-termed Footprints Trail "extends from its physical facilities, the schools and churches once attended by Nelson Mandela, through the playground (sliding stone of Qunu) of his childhood and the villages that nurtured him to the towns and cities beyond" (Mgxwekwa et al., 2019a: 85).

Leisure travel is of relatively much greater significance for Coffee Bay with its beach attractions, surfing, kayaking and other forms of adventure tourism as well as spectacular natural scenery in its surrounds. Visitor surveys at Coffee Bay highlight that the majority of the destination's visitors are attracted by its relaxed atmosphere, its

beach and the natural wonder of Hole in the Wall (Sitinga & Ogra, 2014: 483). The trend for business travel in KSDM is steady; by 2018 it is on a par with leisure travel for numbers of trips. This said business travellers are a critical anchor for accommodation establishments particularly in Mthatha where according to one estimate business tourists represent 81.7 percent of paid commercial accommodation (Kyle Business Projects, 2010). A minor upturn is indicated for recent growth in travel for 'other' purposes which includes for religion, health or sports. Indeed, since 2009 'other' travel has constituted the second most significant purpose of travel for the KSDM.

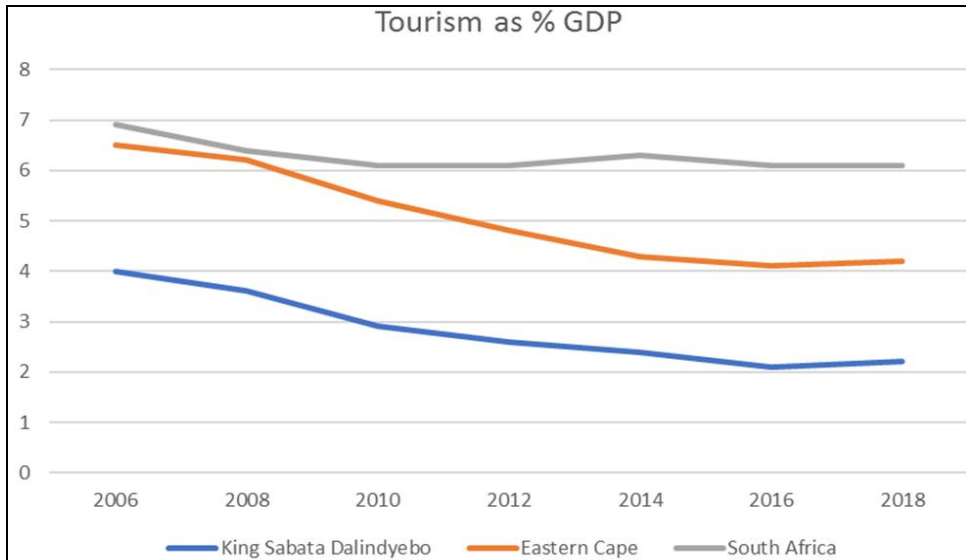


Figure 5. King Sabata Dalindyebo Municipality: Tourism Contribution to Local GDP 2006-2018
(Source: Based on IHS Global Insight data)

The net impact of these downturns in the KSD tourism economy is that in terms of the municipal economy and for local economic development impacts tourism emerges as a sector of only minor significance. Fig. 5 reveals that tourism has been contributing a progressively declining share to local GDP since 2006 when it represented almost 4% to the local economy. By 2018 this share was diminished to just over 2% of GDP for KSDM.

Unpacking the Accommodation Sector

The nature of the accommodation sector of KSD is a reflection of the changing evolution of the tourism economy. Information on the structure of the contemporary accommodation economy of KSD is available from a detailed study which was conducted for the KSD municipality as part of developing a sector plan for responsible tourism (Kyle Business Projects, 2010). This is supplemented by more recent information obtained from a research audit conducted of accommodation establishments across the KSD for 2018.

The 2010 investigation stated that on the supply-side the municipality "has a good selection of accommodation available to the visitor, concentrated mainly in Mthatha and the Coffee Bay/Hole in the Wall areas" (Kyle Business Projects, 2010: 39). The range of different lodging types spans guest houses, bed and breakfast (B & B) establishments accommodation, self-catering, backpacker hostels and caravan/camping parks. Table 1 provides a summary of the results from the investigation which was conducted in 2010. It shows a tourism economy dominated geographically by the Mthatha cluster, most establishments being accommodation SMMEs mainly B & Bs.

Table 1. Supply-Side of Accommodation in KSD Municipality, 2010
(Data source: Adapted after Kyle Business Projects, 2010)

Accommodation Issue	Key Findings
Numbers of Establishments	104 accommodation establishments with the largest numbers being B & Bs (43), guest houses (29), hotels (12) and lodges (11). B & Bs constitute 41.3 % of accommodation establishments
Numbers of Available beds	Estimate total 2 894 for the local municipality of which 83 percent were in Mthatha. Marked differences are observable between Mthatha and Coffee Bay in terms of accommodation options. In Mthatha most beds are in B & Bs (34%), guest houses (29.8 %) or hotels (23.9%) whereas in Coffee Bay most are found in backpacker hostels (40.3 %), hotels (31.6%) or self-catering (13.2%).
Grading of establishments	Of the total establishments 82 % are not graded (star rated) by South Africa's tourism grading authority.
Grading status of beds in establishments	Estimated 22.2 % of available beds are in graded establishments
Average Bed Occupancy	32.1 percent across all forms of accommodation. Considerable seasonality is observable in leisure tourism and occupancies at Coffee Bay.

The largest share of commercial establishments and available bednights are in ungraded tourism establishments. Lastly, a signal of the weakness of tourism economy and of the struggling nature of the accommodation economy is that overall occupancy rates were calculated at only 32 percent. Further insight into the accommodation structure of the KSD municipality can be derived from a 2019 audit of accommodation establishments conducted across the municipality and from interviews that were undertaken with a small number of suppliers of tourism accommodation at both Mthatha and Coffee Bay. The audit reveals that during a period of the demise of the municipality's tourism economy (2010-2018) there occurred an expansion in the actual number of accommodation establishments. The major findings from the 2018 audit are captured on Table 2. The key findings confirm that the largest number of establishments cluster spatially in Mthatha and surrounds with Coffee Bay (and Hole in the Wall) the second most significant node for the supply of tourism accommodation.

Table 2. Supply-Side of Accommodation in KSD Municipality, 2018

Accommodation Issue	Key Finding
Number of Establishments	172 in total. The largest number are described as guest houses (68), followed by Bed and Breakfasts (61), lodges (16), hotels (13), self-catering (9), backpacker hostels (4) and camping/caravan park (1).
Grading of establishments	50 of the 172 establishments indicate a quality status ie. 29 percent of establishments are graded
Geography	153 establishments in Mthatha or surrounds and 19 in Coffee Bay or Hole In the Wall. Differences in accommodation mix between the two clusters with Coffee Bay only small hotels, backpackers and camping. Mthatha with major clusters of guest houses and bed and breakfasts as well as of a total of 9 hotels.
Racial Ownership	On basis of existing evidence <i>at least</i> half of all accommodation establishments in Mthatha are black-owned including leading hotels, most B & Bs, several guest houses/lodges and the local backpacker hostel. In the Coffee Bay cluster the share of black owned establishments is much more limited.
Informal Commercial Accommodation	Observed growth of a number of black-owned homestays especially in Qunu and around Coffee Bay

In terms of forms of accommodation it is evident once more that the largest number of establishments are small-scale B & Bs or guest houses but that the group of hotels are significant also for number of beds. Geographical variations exist with the Mthatha lodging economy in terms of establishment numbers which are dominated by B & Bs and guest houses whereas backpacker accommodation or hotels are the primary forms of available accommodation in the Coffee Bay/Hole in the Wall area. It is noted that new forms of lodging have made their appearance in the KSD municipality; recent additions include the growth of informal homestays (mainly in Coffee Bay and Qunu) and of temporary 'pop-up' luxury 'safari tent' camping in the Coffee Bay environs.

Finally, the 2018 audit was the first of its kind which attempted to identify the racial ownership of accommodation establishments. The results disclose that a significant share of ownership is by Black South Africans, a finding which makes the KSD municipality highly distinctive in terms of other research findings reported for other South African small towns where only minimal ownership of accommodation establishments occurs in the hands of black South African entrepreneurs (see Rogerson & Rogerson, 2019a). At Mthatha the mass of commercial B & Bs are black-owned, all the homestays are black-owned family establishments, several guest houses are black-owned as is the local backpacker hostel, and black ownership extends even to at least two of the leading hotels in Mthatha. By contrast, at Coffee Bay the major hotels and backpacker hostels remain mainly white-owned albeit the survey did disclose the appearance of a number of black-owned accommodation establishments (including of homestays) in the coastal area. Overall, it is concluded that in terms of actual establishments – including the burst of new informal homestays – that the majority of formal as well as informal accommodation establishments in the KSD are black-owned.

Table 3. Characteristics of Accommodation Enterprises in the Local Municipality

Accommodation Issue	Key Finding
Visitor Profile	Marked differences between Mthatha and Coffee Bay. At Mthatha 80 percent domestic and 70 percent of visitors on business. At Coffee Bay 90 percent international and 95 percent leisure.
Length of Business Operation	80 percent in business for >5 years and 40 percent for more than 10 years
Grading of Establishments	70 percent graded, mostly 3 star operations
Capital for Business start-up	90 percent from own funds or friends/family
Reason for Business start-up	Most respondents highlighted the desire for 'economic freedom', 'need for employment' or 'need for income' as driver for business development.
Participation in Tourism Decision-Making	Majority of entrepreneurs (60 percent) were uninformed about policies that impact tourism development in the municipality. In addition, 80 percent of respondents expressed the view that they were not involved in decision-making processes that impact tourism development in the municipality

Table 3 provides a summary of the key findings that emerge from the small sample survey that was conducted with tourism entrepreneurs in Mthatha and Coffee Bay about the operational characteristics of accommodation establishments. The results from respondent interviews confirm that marked geographical differences exist in the market for accommodation providers in the Mthatha cluster as opposed to the coastal cluster of enterprises. In Mthatha the core market is for domestic business travellers whereas at Coffee Bay it is largely for international and almost wholly leisure-oriented tourists with a substantial component of backpackers. The nature of the important business tourist market in Mthatha was revealed further in the study to be dominated by visitors linked to the town's administrative function as headquarters of the O.R.

Tambo District Municipality. Although some respondents observed a small number of private sector business tourists – mainly visits by doctors and lawyers – the vast majority of Mthatha business tourists are related to functions of government.

These include visits either by police officials, nurses or teachers who are attending training courses, meetings and strategic workshops in the town or by local government officials from outside Mthatha to attend meetings at the district municipality offices. Other typical government business tourists would include local tourism officials coming to Mthatha for meetings as well as school inspectors to use the town as a base to conduct their regular inspections of rural schools in the area.

In respect of their business operations as accommodation suppliers the survey highlighted the fact that many are long-established operations and with some in business for 10 years or more. In terms of reasons for business start-up the most common responses concerned the desire for economic freedom and need for employment or source of income which reflect the poor economic circumstances and high levels of unemployment in the KSD municipality. Overall it is evident that entrepreneurial start-up was driven by motivations for financial independence and by the lack of jobs. One respondent indicated that the reason linked to issues of household survival: *“It was because I was not in employment at the time and I was the breadwinner in the family”*. In addition, some respondents cited other motivations for their reason for starting an accommodation enterprise in the municipality: *“Leave a mark for future generations”* or *“I wanted to establish a tourism business within a rural area to prove that rural women can do it”*. In one case the motive was rooted in racial issues: *“It was because of the racial divide – blacks are not usually well received at the white guest houses – so I saw an opportunity to make black guests feel at home”*. Whatever the rationale for business formation, as is typical for most SMMEs in South Africa, the source of capital start-up was either through own savings or financial support from family rather than institutional support. As the sample was dominated by established enterprises it is noteworthy that the majority were registered enterprises and graded in terms of the quality standards of national grading authorities. Of note is that most respondents were unaware of tourism policies that impacted their businesses and, like many tourism SMME, felt excluded from decision-making processes around tourism.

CONCLUSION

As national space economies – as well as tourism space economies – become more polarised the impacts of ‘peripherality’ become imprinted upon the development dynamics of remote and marginal spaces (Pezzi & Urso, 2016, 2017; Todes & Turok, 2018; Lang & Görmär, 2019; Pezzi et al., 2019). Against this backdrop the subject of peripheral tourism is important for tourism scholarship. Arguably, often there are complex management and development challenges surrounding tourism in peripheral regions (Hohl & Tisdell, 1995; Moscardo, 2005; Brouder, 2013; Pezzi, 2017a; Salvatore et al., 2018). The objective in this research was to expand international debates surrounding ‘tourism in peripheries’ and of peripheral tourism development applying a longitudinal approach to provide a chronicle of the evolution of tourism in one particular marginal tourism region of the global South. The case study of the King Sabata Dalindyebo Local Municipality represents a peripheral region of South Africa and is of special interest for incorporating much of the territory that was the former Transkei homeland. The analysis highlights the early emergence and changing evolution of tourism in the area which was radically impacted by apartheid and Transkei ‘independence’. It is shown that the growth of different forms of tourism in this municipality exhibits marked historical and spatial variations between the municipality’s inland and coastal areas. In addition, despite tourism being identified as

one of key drivers for local development, the contemporary tourism economy of this peripheral region shows signs of serious decline. This local municipality - like most local governments in South Africa's distressed regions - lacks the essential institutional capacity in order to maximise its local assets for tourism development. As a consequence, support interventions will be required from higher levels of South African government for ensuring the revival and sustainability of this local tourism economy.

Acknowledgements

Thanks to South Africa's National Department of Tourism for funding this research, to Zinzi Sixaba and Thobeka Dlomo for research assistance and to Arno Booyzen for preparing the map.

REFERENCES

- Ashley, C. & Ntshona, Z. (2003). *Transforming Roles but Not Reality?: Private Sector and Community Involvement in Tourism and Forestry Development on the Wild Coast, South Africa*. Brighton: University of Sussex Institute of Development Studies, Sustainable Livelihoods in Southern Africa, Research Paper No. 6
- Brouder, P. (2013). *Tourism Development in Peripheral Areas: Processes of Local Innovation and Change in Northern Sweden*. PhD thesis, Department of Tourism Studies and Geography, Mid-Sweden University, Ostersund.
- Brown, F., Hall, D.D. & Hall, D.R. eds (2000). *Tourism in Peripheral Areas: Case Studies*. Clevedon: Channel View.
- Carlyle-Gall, C. (1937). *Six Thousand Miles of Sunshine Travel Over the South African Railways*. Johannesburg: South African Railways and Harbours.
- Chaperon, S. & Bramwell, B. (2013). Dependency and Agency in Peripheral Tourism Development. *Annals of Tourism Research*, 40, 132-154.
- Christaller, W. (1964). Some Considerations of Tourism Location in Europe: The Peripheral Regions - Underdeveloped Countries - Recreation Areas. *Papers in Regional Science*, 12 (1), 95-105.
- Crush, J. & Wellings, P. (1983). The Southern African Pleasure Periphery 1966-83. *Journal of Modern African Studies*, 21, 673-698.
- de Witt, A. & Ndzamelala, E. (2018). *KSD*. Johannesburg: South African Cities Network.
- Dinis, A. & Krakover, S. (2016). Niche Tourism in Small Peripheral Towns: The Case of Jewish Heritage in Belmonte, Portugal. *Tourism Development & Planning*, 13 (3), 310-332.
- Dzinotiyweyi, G. (2009). *Making Place Through Urban Restructuring: The Case of Mthatha*. Masters Dissertation (City Planning and Urban Design), University of Cape Town, Cape Town.
- East London Publicity Association (1935). *East London Border and Transkeian Territories*. East London Publicity Association and South African Railways and Harbours, available at National Library of Cape Town. A 1983-395.
- Eastern Cape Socio-Economic Consultative Council (2017). *King Sabata Dalindyebo Local Municipality Socio-Economic Review and Outlook, 2017*. East London: Eastern Cape Socio-Economic Consultative Council
- Grundlingh, A. (2006). Revisiting the 'Old' South Africa: Excursions into South Africa's Tourism History Under Apartheid, 1948-1990. *South African Historical Journal*, 56, 103-122.
- Hall, C.M. (2013). Vanishing Peripheries: Does Tourism Consume Places? *Tourism Recreation Research*, 38 (1), 72-77.
- Harrison, K. (2008). Can Mthatha Turn the Corner? *Delivery*, 18, 24-27.
- Heer, B. (2007). *Commodification and Cultural Tourism: An Inquiry in the Backpacker Resort Coffee Bay*. Unpublished project report, University of Basel, Switzerland.
- Hohl, A. & Tisdell, C. (1995). Peripheral Tourism: Development and Management. *Annals of Tourism Research*, 22 (3), 517-534.
- Hotel Board, South Africa (1972). *Guide to the Hotels in South Africa: Official Publication of the Hotel Board, South Africa*. Johannesburg: Chris Van Rensburg Publications.
- Hotel Guide Association (1965). *Guide to the Hotels of South Africa and Adjacent Territories*. Johannesburg: The Hotel Guide Association.
- Keller, C.P. (1987). Stages of Peripheral Tourism Development - Canada's Northwest Territories. *Tourism Management*, 8, 20-32
- Kepe, T., Ntsebeza, L. & Pithers, L. (2001). *Agri-Tourism Spatial Development Initiatives in South Africa: Are They Enhancing Rural Livelihoods?*. London: Overseas Development Institute, Natural Resource Perspectives No. 65.

- King Sabata Dalindyebo Municipality (2016). *King Sabata Dalindyebo Municipality: Final Draft IDP Review 2016/17*. Mthatha: King Sabata Dalindyebo Municipality.
- King Sabata Dalindyebo Municipality (2019). *King Sabata Dalindyebo Municipality: IDP Review 2019/2020*. Mthatha: King Sabata Dalindyebo Municipality.
- Kyle Business Projects (2010). King Sabata Dalindyebo Local Municipality Responsible Tourism Sector Plan. Report prepared for King Sabata Dalindyebo Local Municipality by Kyle Business Projects, Port Elizabeth.
- Lang, T. & Görmär, F. eds. (2019). *Regional and Local Development in Times of Polarisation: Re-Thinking Spatial Policies in Europe*. Singapore: Palgrave Macmillan.
- Mbontsi, N.S. (2008). An Evaluation of the Role of Local Economic Development in Promoting Infrastructural Development: A Case Study King Sabata Dalindyebo Local Municipality. MSc Social Sciences (Development Studies) thesis, University of Fort Hare.
- Mgxekwa, B.B., Scholtz, M. & Saayman, M. (2019a). So You Want To Walk in the Footsteps of a Legend, But What Are You Willing to Pay?: The Case of the Nelson Mandela Heritage sites. *Journal of New Generation Sciences*, 16 (1), 79-100.
- Mgxekwa, B.B., Scholtz, M. & Saayman, M. (2019b). A Typology of Memorable Experiences at Nelson Mandela Heritage Sites. *Journal of Heritage Tourism*, 14 (4), 325-339.
- Moscardo, G. (2005). Peripheral Tourism Development: Challenges, Issues and Success Factors. *Tourism Recreation Research*, 30 (1), 27-43.
- Msi, A.Z. (2009). Enterprise Development Trends: A Case Study of Mthatha, King Sabata Dalindyebo Municipality. MBA thesis, University of KwaZulu-Natal, Durban.
- Müller, D.K. & Jansson, B. eds. (2007). *Tourism in Peripheries: Perspectives from the Far North and South*. Wallingford: CABI.
- Mzamo, B. (2018). Assessing the Relationship Between Urban Blight and City Attractiveness: The Case of Mthatha CBD. Masters in Town and Regional Planning Dissertation, University of KwaZulu-Natal.
- Nel, E. & Rogerson, C.M. (2016). The Contested Trajectory of Applied Local Economic Development in South Africa. *Local Economy*, 31(1-2), 109-123.
- Ngcukana, L. (2018). Wild Coast Special Economic Zone Could Create Thousands of Jobs. *City Press*, 9 September.
- Ngwira, C.M. (2011). Human Trafficking in Eastern Cape Province, South Africa. MSc degree (Geography & Environmental Science), University of Fort Hare, Alice.
- O.R. Tambo District Municipality (2017). *Integrated Development Plan, 2017-2022*. Mthatha: O.R. Tambo District Municipality.
- Pezzi, M.G. (2017a). From Peripheral Hamlet to Craft Beer Capital: Apecchio and the 'Álogastronomia'. *Italian Journal of Planning Practice*, 7 (1), 154-185.
- Pezzi, M.G. (2017b). When History Repeats: Heritage Regeneration and Emergent Authenticity in the Marche's Peripheral Areas. *Almatourism – Journal of Tourism, Culture and Territorial Development*, 8 (7), 1-20.
- Pezzi, M.G. & Urso, G. (2016). Peripheral Areas: Conceptualizations and Policies. *Italian Journal of Planning Practice*, 6 (1), 1-19.
- Pezzi, M.G. & Urso, G. (2017). Coping With Peripherality: Local Resilience Between Policies and Practices. *Italian Journal of Planning Practice*, 7 (1), 1-23.
- Pezzi, M.G., Faggian, & Reid, N. (2019). Local Entrepreneurship and Tourism Development in Peripheral Areas Between Policies and Practices. *Regional Science Policy & Practice*, 11 (3), 445-449.
- Pike, A., Rodriguez-Pose, A., Tomaney, J. (2006). *Local and Regional Development*. London: Routledge.
- Pike, A., Rodriguez-Pose, A., Tomaney, J. eds. (2015). *Local and Regional Development*, 4 vols. London: Routledge.
- Rand Daily Mail* (Johannesburg Newspaper), 24 July 1980.
- Republic of Transkei (1981). *Transkei Official Tourist and Commercial Guide*. Durban: Advertising Sales Promotion on Behalf of the Department of Planning and Commerce, Transkei.
- Rogerson, C.M. (2011). Youth Tourism in Africa: Evidence from South Africa. *Tourism Analysis*, 16, 105-120.
- Rogerson, C.M. (2014a). Reframing Place-based Economic Development in South Africa: The Example of Local Economic Development. *Bulletin of Geography: Socio-Economic Series*, 24, 203-218.
- Rogerson, C.M. (2014b). Rethinking Slum Tourism: Tourism in South Africa's Rural Slumlands. *Bulletin of Geography: Socio-Economic Series*, 26, 19-34.
- Rogerson, C.M. (2015). Tourism and Regional Development: The Case of South Africa's 'Distressed Areas'. *Development Southern Africa*, 32, 277-291.
- Rogerson, C.M. (2019). Business Tourism Under Apartheid: The Historical Development of South Africa's Conference Industry. *Urbani izziv*, 30 (Supplement), 82-95.
- Rogerson C.M. & Rogerson, J.M. (2018). The Evolution of Hotels in Johannesburg 1890-1948: A Case of Historical Urban Tourism. *GeoJournal of Tourism and Geosites*, 23 (3), 732-738.

- Rogerson, C.M. & Rogerson, J.M. (2019a). Tourism, Local Economic Development and Inclusion: Evidence from Overstrand Local Municipality, South Africa. *GeoJournal of Tourism and Geosites*, 25 (2), 293-308.
- Rogerson, C.M. & Rogerson, J.M. (2019b). Historical Urban Tourism: Developmental Challenges in Johannesburg 1920-1950. *Urbani izziv*, 30 (Supplement), 112-128.
- Rogerson, J.M. (2017). 'Kicking Sand in the Face of Apartheid': Segregated Beaches in South Africa. *Bulletin of Geography: Socio-Economic Series*, 35, 93-109.
- Rogerson, J.M. (2018). The Geography of Tourist Bednights in South Africa. *GeoJournal of Tourism and Geosites*, 23 (3), 835-847.
- Salvatore, R. Chiodo, E. & Fantini, A. (2018). Tourism Transition in Peripheral Rural Areas: Theories, Issues and Strategies. *Annals of Tourism Research*, 68, 41-51.
- Sitinga, S.B. & Ogra, A. (2014). Place-making in Tourism-led Local Economic Development (LED): A Case Study of Coffee Bay, Wild Coast, Eastern Cape Province, South Africa. In *Proceedings Planning Africa 2014*, International Convention Centre, Durban, 19-22 October.
- Sixaba, Z. & Rogerson, C.M. (2019). Black Economic Empowerment and South African Tourism: The Early Pioneers. *African Journal of Hospitality, Tourism and Leisure*, 8 (4), 1-10.
- Siyongwana, P. Q. (2005). Transformation of Residential Planning in Umtata During the Post-apartheid Transition Era. *GeoJournal*, 64, 199-213.
- Siyongwana, P. Q. (2009). The Impact of Political Transformation on Employment in the Transkei Bureaucracy and Civil Service in Umtata, South Africa, Since 1994. *GeoJournal*, 74, 293-310.
- South African Railways and Harbours (1936). *Illustrated Guide to Hotels and Boarding Houses, 1936*. Pretoria: Government Printer.
- South African Railways Tourist Office (1949). *South African Native Studies*. Johannesburg: South African Railways Tourist Office.
- Streek, B. & Wicksteed, R. (1981). *Render Unto Kaiser: A Transkei Dossier*. Johannesburg: Ravan Press.
- Todes, A. & Turok, I. (2018). Spatial Inequalities and Policies in South Africa: Place-based or People-centred?. *Progress in Planning*, 123, 1-31.
- Tsheleza, V., Ndhleve, S., Kabiti, H.M., Musampa, C.M. & Nakin, M.D.V. (2019). Vulnerability of Growing Cities to Solid Waste-related Environmental Hazards: The Case of Mthatha, South Africa. *Jamba: Journal of Disaster Risk Studies*, 11 (1): 632. doi: 10.4102/jamba.v11i1.632
- The Union Publishing Agency (1921). *Illustrated South African Hotel Guide for Travellers and Tourists 1920-21*. Cape Town: Cape Times.
- Visser, G. (2004). The Developmental Impact of Backpacker Tourism in South Africa. *GeoJournal*, 60, 283-299.
- Wanhill, S. (1997). Peripheral Area Tourism: A European Perspective. *Progress in Tourism and Hospitality Research*, 3, 47-70.
- Wildman, K. (2005). *The Beach: The Making & Remaking of Coffee-Bay (1945-2005)*. MPhil dissertation in Public Culture, Centre for African Studies, University of Cape Town, Cape Town.

Submitted:
02.07.2019

Revised:
15.10.2019

Accepted and published online
16.10.2019

THE REVEALING CASE OF CULTURAL CREATIVES AS TRANSMODERN TOURISTS IN SOWETO, SOUTH AFRICA

Sandile L. MKHIZE*

University of Johannesburg, School of Tourism and Hospitality,
College of Business and Economics, South Africa, e-mail: sandile.lmkhize@gmail.com

Milena IVANOVIC

University of Johannesburg, School of Tourism and Hospitality,
College of Business and Economics, South Africa, e-mail: mivanovic@uj.ac.za

Citation: Mkhize S.L., & Ivanovic M., (2019). THE REVEALING CASE OF CULTURAL CREATIVES AS TRANSMODERN TOURISTS IN SOWETO, SOUTH AFRICA. *GeoJournal of Tourism and Geosites*, 26(3), 993–1005. <https://doi.org/10.30892/gtg.26324-412>

Abstract: This article investigates the phenomenon of transmodern tourism in Soweto as it statistically tests the theoretical assumption that Cultural Creatives are a clearly identifiable group of transmodern tourist in general tourists population. The results of ANOVA confirmed a group difference between Cultural Creatives and general tourists, leading to a major finding that Cultural Creatives presence in Soweto (54.8%) is two-times (26.1%) more than the value predicted by the literature. In addition, *Walking around the township* is identified as Cultural Creatives' most authentic experience which further validates the recommendation for development of an innovative range of immersive and authentic experiences in Soweto that conforms to Cultural Creative's transmodern value system.

Keywords: Transmodernism, Cultural Creatives, Authenticity, Transformative experience, Conscious consumers, Soweto

* * * * *

INTRODUCTION

The world out there is changing at an unprecedented rate. These changes are not only environmental, economic, social and political but mounting evidence point to a rise of a new planetary consciousness and new world order known as transmodernism (Ateljevic, 2009, 2011; Ghisi, 1999, 2008:158, 2010; Pritchard et al., 2011:941; Rifkin, 2005; Rodriguez, 1989, 2017). Transmodernism is evident in all aspects of people's lives, from consumption, value(s) system, work, leisure patterns, global ecological awareness, to concerns for the survival of the humankind and the quest for more fulfilling and spiritual lives. In the forefront of transmodernism is a silent but powerful class of transmodern consumers known as Cultural Creatives (Ray, 2008; Ray & Anderson, 2000). They are converging across the nations creating a new, wiser, transmodern culture embedded in a

* Corresponding author

post-capitalist, post-modernist holistic value system way beyond postmodernity (Rifkin, 2005:121). Even though Cultural Creatives are still lacking a sense of self-identity or group identity as was historically the case with other subcultures (Hippies, New agers, Baby boomers etc) they can be identified based on their transmodern worldviews and their new value system. They are conscious consumers who reject the postmodern obsession with consumerism and materialism and stand for a new, just and sustainable world. The mounting evidence exist that Cultural Creatives are in fact leading a silent revolution towards a new global value system and a new transmodern world order on a scale not experienced in the past 600 years, since the Renaissance (Ateljevic, 2009; Gelter, 2010; Ghisi, 2010; Pritchard et al., 2011; Rodriguez, 1989, 2004; Tribe, 2008, 2009). The emergence of the Cultural Creatives has profound implications for tourism because they uphold the same life values in everyday life as they do in travel (Ray & Anderson, 2000). They demand travel to be an educational, experiential, authentic, altruistic and/or spiritual experience leading to personal transformation through learning and discovery (Ivanovic, 2014; Tomljenovic, 2015). Their interaction in a destination is sustainable and honest as they immerse themselves in the local culture, while showing respect for local people and their way of life. In the same vein, Cultural Creatives are genuinely interested in the problems of the destination for which they seek long-term environmental and socio-economic solutions as they tend to come back as volunteers or make a difference in the ways that matter (Reisinger, 2015; Wolf et al., 2017).

It is with the prevalence of Cultural Creatives as a new breed of conscious consumers/tourists that the need for the creation of new authentic experiences arises and, consequently, the need for an economic alignment of products use-value with the consumers authentic self-image (Ivanovic & Saayman, 2015:33).

There is no doubt that authentic experiences that fit into the new transmodern value system of Cultural Creatives as tourists will be paving the way for the organic development of transmodern tourism in the world and subsequently in Africa and South Africa. Contrary to expectations, an extensive literature review revealed that there are only a few research studies focusing on either transmodernism or prevalence of Cultural Creatives and their experiences in the major world tourism destinations and there was not one African or South African study with the same focus. A complete lack of understanding who these new transmodern tourists visiting South Africa are, and what kind of experiences and activities they want is not helping the South African tourism agenda focusing on job creation and poverty alleviation (Strydom et al., 2019:8). In order to address the shortcomings identified in the literature and provide some basic understanding of the way transmodernism is shaping the new tourists experience in South Africa, the aim of this article is to apply a transmodern value system as identified by Ray and Anderson (2000) in detecting Cultural Creatives among international tourists visiting Soweto. The article statistically tests the theoretical assumption that due to a profound transmodern value system that they uphold, the Cultural Creatives are a clearly identifiable group of transmodern tourists. This assumption is strengthened by Ray's (2008:6) clarification that, as part of the subculture, Cultural Creatives come "with new values, lifestyle and worldviews, and these cannot be predicted by demographics because they are deeper than demographics". In the same vein the article is set to uncover what activities and experiences are undertaken by Cultural Creatives in Soweto which contribute the most to their authentic experience while conforming to tourist transmodern value system and lifestyle anticipated by the literature.

THEORETICAL FRAMEWORK

The theoretical framework pertinent to this article presents an overview of transmodernism as the new world order and a dominant paradigm: Cultural Creatives as

a powerful group of consciousness consumers at the forefront of transmodernism; and transformatory experience as a type of new immersive authentic experience in tourism.

Transmodernity

Three prominent philosophers, Spanish Rodriguez Magda (1989, 2017), Belgian Luychx Ghisi (1999, 2008, 2010), and Argentinian-Mexican Enrique Dussel (2002) laid the foundation for the concept of transmodernity. Defined as an all-encompassing “socio-cultural, economic, political and philosophical shift” way beyond post-modernism, transmodernism carries a universal message of hope for the survival of humankind (Ateljevic, 2009). As a post-industrial contemporary concept, transmodernity represents a decline in the dominant Euro-American industrial, patriarchal, imperial, capitalistic and colonial world-system of the modern society, thus embodying the African decolonising paradigm (Dussel, 2002; Ghisi, 2008). In the heart of transmodernism is Dussel’s (2002) Philosophy of Liberation, a global project which rejects the European superiority of the last five centuries and unmasks the invention of the Other, of the colonized Africans in particular (Mekonnen, 2012:10). As such, it is undoubtedly an emerging xenophilic consciousness, a celebration of local and global diversity based on greater tolerance for ethnic, racial and sexual differences (Gelter, 2010).

Transmodernity is also a paradigmatic societal transformation that transcends the two earlier paradigms and world orders: modernism and postmodernism. Modernism is associated with the Fordist economy of scales driven by mass production of products and services with universal appeal. It is founded on Western assumption of rational inquiry and scientifically proven truths which in turn negate intellectual diversity and tolerance leading to unfairness and oppression for others. Modernism as a societal system is non-inclusive as it advocates each individual to pursue success, which, in the western vernacular, has generally meant the rat race for financial success and status display leading to alienation (Ray, 2008: 12; Rifkin, 2005). For this reason, the alienated modern man as a tourist is in constant search of authenticity in other places and other times, the search damned to inauthenticity because they cannot escape the mass produced and irrevocably commodified tourism spaces. Postmodernism is seen as the antithesis to modernism as it is associated with the Post-Fordist economy of scope changing the economic focus from mass production to mass consumption (Pine & Gilmore, 2012). As a worldview postmodernism represents a deconstruction of reality whereby everyone’s narrative is equally compelling. This in turn leads to endless differentiations of reality resulting in cultural diversity, competing beliefs, pluralism, ambiguity and the stagnation of the modern value of progression, culminating with ‘meaningless hyper-consumerism’ of the postmodern society (Ateljevic, 2009; Ateljevic & Tomljenovic, 2016:28; Rifkin, 2005; Tribe, 2009). As the reality retreats it leads to a complete collapse of real and hyper-real into one reality, a simulacrum as a spectacle, an experiential form in which the real, authentic objects and events are replaced by simulated artificial, hyper-real fantasy world. In tourism, it leads to a dominance of a simulated reality (Disney World alike) in which post-tourists replace authenticity with an inauthentic experience of reality lacking depth and superficiality in understanding other cultures.

As both paradigms have reached a point where they can no longer proceed on their own as dominant worldviews, transmodernism, as a synthesising paradigm, is capable of taking the two preceding paradigms, modernism and postmodernism, from the edge of chaos towards an all-inclusive and democratic order of society. In the forefront of transmodernism is the new trans-capitalist economic order known as the authentic economy (Gilmore & Pine, 2007). In authentic economy, all consumers request authenticity as the new purchasing criteria. In every sector of economy businesses must add *authenticity of experience* as a value to be managed as a critical component of

production and consumption. Even more importantly, what consumers purchase (tourists included) should conform to their own self-image as an authentic-self and what they buy must reflect who they are and who they aspire to be in relation to how they perceive the world. The offerings that do not appeal to the authentic self-image are regarded inauthentic or fake as is the case of Cultural Creatives, discussed below.

Cultural Creatives

In 2000, Dr Paul Ray and Sherry Ruth Anderson discovered a silent group of consumers, calling them the Cultural Creatives, as a surprising result of the longitudinal psychographic research on over 100,000 Americans and 100 focus groups on consumer values and beliefs. The results were published in the book 'Cultural Creatives: How 50 Million people are changing the world' suggesting that 24% or about 50 million adults at that time (hence the book title) of the US adult population fall into the new Cultural Creatives subculture. Subsequent research by Ray (2008) suggest that Cultural Creatives account for 26.1% of the world's population revealing their annual rise of 3% since they were first detected in 2000. As clearly identifiable sub-culture, Cultural Creatives dedicate their lives to the pursuits of personal development and growth, a purposeful life grounded in spirituality while at the same time making a positive change on the planet (Ray & Anderson, 2000; Florida, 2012). Cultural Creatives are competent, inner-directed activists with convictions that are so strong that they can steer their values, lifestyle and subculture undeterred in spite of opposing value pressures from the larger culture in which they live (Ray & Anderson, 2000; Ray, 2008). They demand authenticity in every sphere of their lives, "at home, in stores, at work, in politics" and in travel (Ray & Anderson, 2000:5). In their lifestyle choices, they strive to balance rationality (facts) and intuition (feelings) for the best of both worlds. The surfacing of the Cultural Creatives as a socio-political movement or sacred activism, stems from the realisation that human capabilities come from within and, therefore, reaffirm individual growth, spirituality and actions that counter contemporary global discourses of fear, alienation and disempowerment (Ateljevic, 2009: 290).

Transformatory tourist experience

Following a shift in the tourist experience from staged pseudo-events to rendering authenticity, the quest for authentic experiences in tourism has become paramount (Pine & Gilmore, 2012; Morrison et al., 2017). With its alignment to transmodernism, new tourism trends have the unrestricted potential to initiate personal and societal transformation towards newly emerging life values and world-views evident in a silent subculture of Cultural Creatives (Robledo & Batle, 2017; Reisinger, 2015; Tomljenovic, 2015:4; Wolf et al., 2017). A change in life values towards self-discovery, independence, care for places visited and a quest for deeper meaning and self-development is the basis of human progression which makes people mentally free when travelling and thus motivating them to develop, unfold and actualize their inner human potential (Welzel, 2006). In essence, tourism experiences that are somewhat challenging but aligned to individual's values and conform to an individual experience of the real world and an authentic-self, are defined as transformational (Tomljenovic, 2015: 5).

As such, transformation is the highest order need, positioned beyond self-actualisation on the Maslow's pyramid of needs (Gelter, 2010:48). When individuals feel themselves to be both in touch with the real world and with their real selves, they are having an authentic experience. Since transformational experience is founded in tourists demand for an authentic experience in all spheres of their lives, such demand should be managed as a critical component of production and consumption of experiences in tourism (Gilmore & Pine, 2007). Contrary to Cultural Creatives who, as tourists, demand authenticity and personal transformation through immersive tourist experiences, the post-tourists are in search of simulacra as an illusion of authenticity, rather than a

definitive reality. As post-tourist do not share the same world values and do not demand deep authentic experience as Cultural Creatives do, the two groups can be clearly delineated. Since a core business of tourism as part of new authentic economy is to sell experiences, the issue of authenticity in tourism in its transmodern form is expected to change its experience game in the very near future (Ivanovic & Saayman, 2015:25).

MATERIALS AND METHODS

This is an exploratory mixed method study based on a survey (N=252) derived from Anderson and Ray (2000) questionnaire consisting of 16 transmodern life values. Qualitative methods included semi-structured interviews (n=20) as means of ensuring validity of the survey findings, and non-participant observations (diary and photos) as a method of monitoring the behaviour of tourists during their visit (are they walking around Soweto on their own, are they breaking away from the group, do they behave ethically towards locals eg. not taking photos without permission etc.). Non-probability quota sampling is selected as the main method of data collection in order to ensure representativity of the samples in exact proportion to their respective quantities in official national statistics (Americas, Europe, Asia & Australasia, and the Middle East).

This was done in order to infer the result and compare the actual percentage of Cultural Creatives in Soweto with the expected presence of Cultural Creatives in the general population world-wide. As already pointed out, there is not yet a world map of the spread of Cultural Creatives globally and there is not yet data available that accounts for the number of Cultural Creatives in South Africa. However, for the purpose of this study, two estimates are used as the baseline; Ray's (2008) estimate of 26.1% share of Cultural Creatives in the global population, and Ivanovic and Saayman (2015) estimate that 18.3% of purposeful cultural tourists visiting South Africa can be regarded the closest representatives of Cultural Creatives. Therefore, the assumption is that a minimum of one out of every five (1:5) international (long haul) tourists coming into Soweto should be the closest representation of a Cultural Creative. The proportional quota sample retrieved for this study (N=252) of inbound international tourists visiting South Africa from respective generating regions (Table 1) is deemed reliable (at 95% confidence level) as it mirrors the same inbound tourist stratum as per the official national statistic (StatsSA, 2018).

As a second layer of sampling, purposeful sampling based on tourists behaviour was simultaneously employed to ensure Cultural Creatives are included since they cannot be identified based on profiles or demographics. While maintaining strata mirroring for tourist generating regions the respondents are further selected based on the following criteria: (1) tourists from a local backpacker establishment (51), tourists wandering alone in the township (151), and general tourists in coach/planned tours (50). Identifying three groups based on behavioural preferences is done for purely practical reasons to ensure Cultural Creatives are represented in the sample based on their expected preferences while in Soweto. Delineation between three groups was also necessary to facilitate a statistical comparison within and between the groups to clearly identify Cultural Creatives based on their life values. The survey data was captured and coded using Microsoft Excel while the Statistical Package for the Social Sciences (SPSS) version 2.3 was used for data analysis. Data collection took five months to complete, 03 January 2018 – 30 May 2018, carried out by one of the authors who is a Soweto native.

Questionnaire development

Given the complexity of the terms and tourist's unfamiliarity with underlying values of transmodernism, the questionnaire was pre-tested on two occasions (11th – 12th August 2017 & 18th – 19th August 2017) and further piloted based on 40 questionnaires (8th September – 21st October 2017). A number of changes were made to the

questionnaire according to the aspects identified in the pre-tests and pilot questionnaires. Despite changes in the wording of the 28 value statements, the questionnaire was kept in accordance with the most consistent 16 values identified by Ray & Anderson (2000) and Ray (2008) surveys. The Cronbach's Alpha, $\alpha = 0.624$, confirms the internal validity of the 1-4 Lickert scale as the instrument items are reflective of the underlying transmodern constructs. Therefore, as survey respondents agree or disagree to 28 statements in the worldview scale (Table 2) measuring 16 dimensions/values of transmodernity, they can be classified as either a close representative of a Cultural Creative or as the others who are the general tourists. The differentiated spread of Mean value score, including 5 adjusted negative values, $M = 19.05$ ($SD = 3.78$, $N = 252$), was used to identify Cultural Creatives from general tourists. The use of a 4-point forced answer Likert scale not leaving an option for respondents to remain neutral, is justified by the following two reasons (Pallant, 2011). Firstly, transmodern phenomenon deals with a whole set of new world-views and values the meaning of which would be very difficult to interpret in case of neutral responses. Secondly, forcing respondents to decide which transmodern values they uphold allows for more precision during data analysis.

Area of study: Soweto

Soweto is a significant tourist node in South Africa attracting 212 000 tourists in 2016 (SAT, 2017:82). Tourists are interested in seeing the main symbols of South Africa's struggle against the apartheid (Mandela House in Vilakazi Street and the Hector Pieterston Museum), as well as how the country has progressed since its first democratic elections in 1994. Township tours to Soweto, therefore, continue to gain considerable popularity amongst tourists visiting South Africa who want to see the 'real' people of Soweto (Ramchander, 2007). Soweto has become a symbol of oppression and liberation, thus, the freedom values associated with Soweto are in line with what new emerging transmodern consciousness and Cultural Creatives stand for, validating the choice of Soweto as the study area. Figure 1 is a map of Soweto highlighting the areas where the tourists were targeted.

Table 1. Demographic characteristics

N=252		Frequency	%
Age groups	19 & younger	34	14.5
	20 - 29	121	51.3
	30 - 39	53	22.5
	40 - 49	17	7.2
	50 & above	11	4.7
Gender	Male	113	44.8
	Female	129	51.2
	LGBTQ	10	4
Highest education	Primary/Secondary	39	15.9
	Vocational	34	13.9
	Bachelor's Degree	96	39.2
	Masters/Doctoral degree	63	25.7
	Other	13	5.3
Country of origin	Africa	56	22.4
	Europe	128	51.2
	Middle East	5	2
	Asia & Australasia	15	6
	Americas	46	18.4

RESULTS DISCUSSIONS

Demographic characteristics

Apart from the slight dominance of female visitors, (53.3%), a significant 73.8% of the visitors fall into the 20 – 39 years age category and a staggering 65% of respondents

were highly educated (39.2% Bachelor's degree and 25.7% Master's/Doctoral degree). Even though demographic characteristics of Cultural Creatives visiting Soweto are revealing, they are not reflective of Cultural Creatives life values and transmodern worldviews, and cannot be used as a selection criteria in future studies.

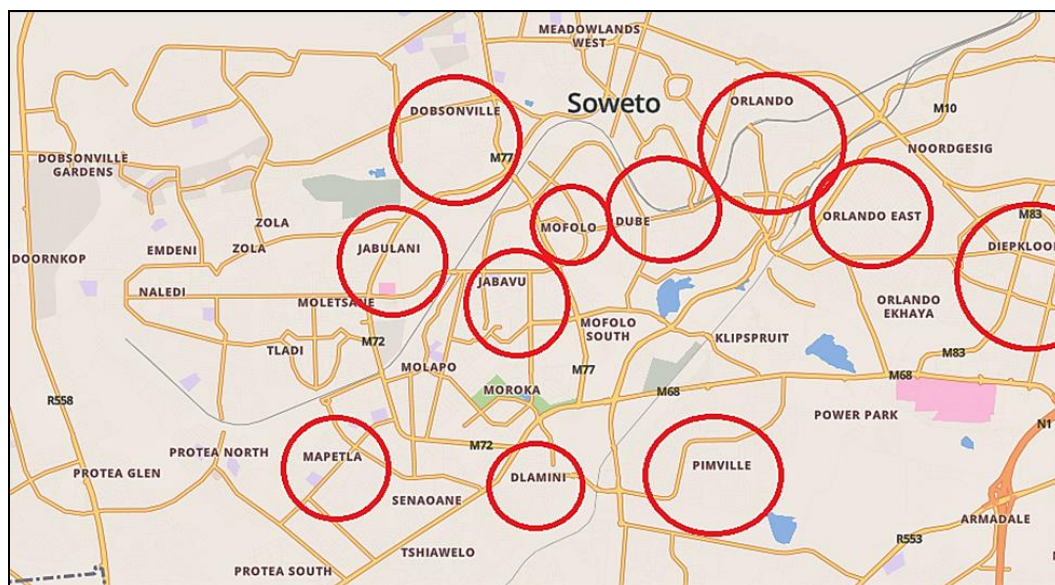


Figure 1. Map of Soweto (Source: AfriGis, 2019)

Transmodern values

As conscious consumers, the Cultural Creatives are standing for the transmodern values they consider important and are taking active action towards their realisation (recycling, healthy lifestyle/food, minimalism, pro-feminism etc.) (Gelter, 2010; Ghisi, 2008:158). The most important Cultural Creatives' transmodern values identified by Ray (2008) were: (1) to see nature as sacred (89%), (2) concern about the condition of women and children worldwide and at home (87%), and (3) liking what is foreign and exotic in other cultures (xenophiles) (85%). Demand for authenticity (63%), self-actualization (63%) and spirituality (46%) were clearly taking a back seat. The results presented in Table 2 reconfirm the dominance of the top two values identified by Ray, the xenophiles (89.6%) and pro-feminism (81.25%). Surprisingly, in only a decade, desire for self-actualisation (78.1%) and authenticity (70.15%) emerged as top values, further serving as a proof of an emerging transmodern value system. The fact that the results of this study, presented in Table 2, overlap with those identified by Ray (2008:7), is further confirmation of the validity of the scale and the study's findings.

The results of the value scale further confirm that 54.8% of tourists visiting Soweto are closest representatives of Cultural Creatives, of whose, as expected, 72.5% are in backpackers group, 58.3% are wandering tourists, and 26% are general tourists.

ANOVA one-way between groups analysis of variance

In this study, one-way ANOVA is conducted to test if there was a statistically significant difference in the Mean scores of the three dependent groups (backpackers, general tourists and wandering tourists) against the Cultural Creative score as an independent variable (Pallant, 2011:105). The ANOVA results show ($F = 17.65$, $p = 0.001$, $p < 0.05$) that the Sig. value is less than 0.05 meaning that somewhere between

and within the three groups there is a statistically significant difference among the Mean scores. However, the ANOVA does not show where the statistically significant difference is. To find this difference, the Dunnett T3 test was used.

Table 2. The results of Transmodern worldviews and life values Likert scale

Transmodern values & worldviews	Strongly disagree % (n)	Disagree % (n)	Agree % (n)	Strongly agree % (n)	Mean
(1) Xenophilism					
I easily connect with people from a different race and culture	1,7 (4)	8,8 (21)	38,8 (93)	50,8 (122)	3.3 9
(2) Self-actualization					
Knowledge is for sharing, not for keeping to oneself	2,9 (7)	11,2 (27)	24,9 (60)	61,0 (147)	3.4 4
This trip has helped me rediscover myself	5,4 (13)	24,4 (59)	52,1 (126)	18,2 (44)	2.8 3
(3) Desire for authenticity					
I only buy brands which are reflective of my values	8,2 (20)	36,1 (88)	39,8 (97)	16,0 (39)	2.64
Travelling helps me reconfirm my values	3,7 (9)	11,8 (29)	48,6 (119)	35,9 (88)	3.17
(4) For spirituality					
I believe in spiritually, not a religion	11,9 (29)	20,2 (49)	40,3 (98)	27,6 (67)	2.84
I have experienced being spiritually absorbed into something greater than myself	8,5 (210)	30,2 (75)	44,8 (111)	16,5 (41)	2.69
(5) Minimalism					
I own things I don't really use	7,6 (19)	28,0 (70)	46,0 (115)	18,4 (46)	2.73
I only buy things that I really need	8,2 (20)	32,8 (80)	36,5 (89)	22,5 (55)	2.75
(6) Eco-sustainability					
I always recycle wherever I go	8,9 (22)	29,3 (72)	42,7 (105)	19,1 (47)	2.72
I often support animal protection initiatives	4,0 (10)	36,1 (90)	46,2 (115)	13,7 (34)	2.69
(7) Concern for job prospects					
I spend most of my time trying to get to the top of the corporate ladder	16,5 (40)	28,0 (68)	33,7 (82)	21,8 (53)	2.61
(8) Nature as sacred					
The earth can always provide for us no matter how much we use its resources *(CC negative response)	38,1 (94)	26,3 (65)	21,1 (52)	14,6 (36)	2.12
I feel ashamed that we have caused so much damage to the planet	6,9 (17)	17,8 (44)	37,7 (93)	37,7 (93)	3.06
(9) Concern over global warming					
"Global warming" is a hoax *(CC negative response)	47,7 (115)	19,5 (47)	17,8 (43)	14,9 (36)	2.00
I use public transport often to reduce my carbon emissions	13,6 (33)	28,8 (70)	37,9 (92)	19,8 (48)	2.64
(10) Pro-feminism					
I believe women are equal to men	6,6 (16)	11,9 (29)	23,8 (58)	57,8 (141)	3.33
Women are too caring and so should NOT be managers/leaders *(CC negative response)	58,0 (142)	22,9 (56)	12,2 (30)	6,9 (17)	1.68

(11) Altruism					
I gladly give my time, money and skills to the underprivileged	5,9 (14)	24,1 (57)	46,4 (110)	23,6 (56)	2.88
I actively participate in welfare initiatives for homeless people	7,9 (19)	40,1 (97)	35,5 (86)	16,5 (40)	2.61
People should focus on helping themselves, not others *(CC negative response)	33,2 (81)	41,8 (102)	16,4 (40)	8,6 (21)	2.00
(12) Reject neo-liberal economics					
I rely on marketing messages to help me choose what I buy	21,4 (54)	29,0 (73)	31,3 (79)	18,3 (46)	2.46
(13) Financial materialism					
Money is the ultimate measure of progress in my life	16,7 (42)	40,9 (103)	23,4 (59)	19,0 (48)	2.45
(14) Idealistic social contribution					
Volunteering in a local community is a waste of time *(CC negative response)	50,4 (125)	28,6 (71)	15,7 (39)	5,2 (13)	1.76
Compassion is the key to saving the world	2,8 (7)	22,2 (55)	45,6 (113)	29,4 (73)	3.02
(15) Mass media tolerance					
Television is my daily source of entertainment	31,1 (78)	35,5 (89)	25,9 (65)	7,6 (19)	2.10
(16) Social concern/activist					
I participate in initiatives against: Domestic violence and gender inequality	9,3 (23)	29,4 (73)	41,9 (104)	19,4 (48)	2.71
I am actively involved in politics	21,0 (52)	40,7 (101)	29,8 (47)	8,5 (21)	2.26

N (237-252) *negative response reveals the Cultural Creatives value

The Dunnett T3 multiple comparison test of group differences

The Dunnett T3 indicates that there is a statistically significant difference at the $p < 0.05$ level in the Mean scores of the three groups: $F(17.645, p=0.01, N=252)$. The variance for *backpackers* ($S^2 = 11.107$), *general tourists* ($S^2 = 8.449$) and for *wandering tourists* ($S^2 = 14.461$) suggests that the groups are significantly dispersed from each other as they were targeted differently based on different tourist settings (backpacker - hostels, general tourists - coach tours and wandering tourists - unbeaten paths). The Mean score for general tourists ($M = 16.60, SD = 2.90, n=50$) is significantly different from wandering tourists ($M = 19.32, SD = 3.80, n=151$). Another significant Mean difference is between backpackers ($M = 20.67, SD = 3.33, n=51$) and general tourists. However, there is no statistical difference in the Mean score between backpackers and wandering tourists suggesting that wandering tourists and backpacker tourists uphold similar transmodern values.

Results of Pearson's Chi-Square (X^2) and Crammer's Value (V)

The Pearson's Chi-Square test is used to assess if there is a relationship between upholding a transmodern value system and the level of authenticity experienced while engaging in different activities and experiences in Soweto. The results of Pearson's Chi-Square $X^2(2, n=128) = 9.462, p = 0.009$, where $p < 0.05$ reveals only one significant relationship between *walking around a township* and the level of authenticity experienced. The results of the Crammer's V measurement confirmed the results of Pearson's Chi. The cross classification for *walking around a township* ($n=128$) indicates an almost medium strength of relationship coinciding with Cohen's (1988) medium effect size (0.10 small, 0.30 medium and 0.50 large effect size) and is the highest Crammer's value ($V = 0.272$) of all the cross classifications. These tourists are the closest representatives of Cultural Creatives in a quest for immersive experiences, as predicted by the transmodern life values.

QUALITATIVE RESULTS

The results of Thematic Content Analysis from 20 interviews are triangulated with the results of statistical tests and photographs to confirm the validity of statistically identified transmodern values and transformatory tourist experience.

Theme 1: Transmodern values

From the results presented in Table 2 it becomes evident that the majority of tourists visiting Soweto are actively concerned with social issues most evidently giving up their time, money or skills to the underprivileged (70%), volunteering (79%), and participating in initiatives against domestic violence and gender inequality (61.3%).

"I was 18 (age) first time I was in Tanzania. I was volunteering with no values, but this really changed me... to be more open minded" (Austria, 20-29, Female)

Tourists visiting poor localities such as townships are often criticised for disrespecting locals making them feel as if they are in a zoo by observing and photographing the locals from a moving tour bus (Ramchander, 2007). As the closest representatives of the Cultural Creatives, the tourists in the study exhibit a strong sense of restraint by not seeing themselves as merely spectators, but as human beings entering the living space of other human beings. Because Cultural Creatives are mindful of their impacts on local cultures, they are the most desired type of tourists to visit poor South African townships.

"Well I told them I don't really want to take pictures because people are living here and it's not like I went to the zoo or anything" (Germany, 20-19, Female)

Table 3. The Pearson's Chi-Square Test: The tourist activities related to authenticity of experience

	Pearson Chi-Square (X ²)	Asymptotic Significance (2-sided)	Crammer's Value (V)	df	N of Valid Cases
Mandela House Museum	5.180	0.075	0.175	2	170
Orlando Towers Bungee	1.490	0.475	0.147	2	69
Eating in local restaurants	0.115	0.944	0.031	2	119
Hector Pieterse Museum	0.836	0.658	0.080	2	131
Vilakazi Street tour	2.048	0.359	0.133	2	115
Cycle tour	2.623	0.269	0.161	2	101
Volunteering	2.762	0.251	0.220	2	57
Visiting a crafts market	1.627	0.443	0.112	2	130
Walking around a township	9.462	0.009	0.272	2	128

Theme 2: Transformatory tourist experience

The results in Table 2 clearly confirm deeper, transformatory meaning of travel as 84.5% of the tourists feel that travelling helps reconfirm their life values, while 70.3% feel that their trip to South Africa helped them rediscover themselves.

"I think that's the whole purpose of travelling, to reconfirm values" (Austria, 20-29, Female)

A need for a 'live like a local' immersive experience denotes a search for meaningful consumption and growth through learning and discovery (Ivanovic, 2014; Morrison *et al*, 2017). In the case of the Cultural Creatives, it is the search for tourism offerings that lead to transformatory experiences that validate a sense of being true to one's (authentic) self (Ivanovic & Saayman, 2015: 33). The tourists in the study indeed value human interaction and so undoubtedly express the desire for a tourism experience that involves varying degrees of immersion with the lives of the local people.

"Not just staying in a fancy hotel, eat at a restaurant, just do shopping and leave Johannesburg. Real vacation or real life is to be with the family and to be in their daily life... It was a big honour for me that I came in to their daily life and shared their daily life..." (Sweden, 30-39, Female)

Theme 3: Desire for Authenticity

A desire for authenticity emerged as a critical component of the Soweto tourism offerings (Pine & Gilmore, 2012; Gilmore & Pine, 2007).

"...the whole Vilakazi street is like the less authentic part" (USA, 20-29, Male)

Inauthentic pseudo sites, objects and tourism offerings do not impress contemporary travellers (Nicolaidis, 2014:1). Paradoxically, places that are specifically designed for tourists seem to be the very places that deprive tourists from having an authentic experience. Tourists visiting Soweto clearly recognise the tourist settings are essentially staged and so the authenticity of the experience is seen as staged. Almost half of the tourists visiting a township in South Africa want to go for something more (George & Booyens, 2014):

"Living with local people in their house" (France, 30-39, Male)

To help meet the authenticity requirement, tourist need to become active participants in the shaping of their own experiences. The triangulation of the results of Pearson's Chi-Square ($X^2=9.462,p$) and Crammer's Value (V) with the interview responses regarding the most authentic experience in Soweto, clearly confirm the statistical results that 'walking around the township' is the most authentic activity of Cultural Creatives.



Figure 2. Students from Vienna enjoying a night out with one of the authors (Soweto local) at the Bafokeng Corner Pub & Grill, Phiri – South Soweto, 23 February 2018

"When we walked through the township" (Lithuania, 30-39, Female)

"No, I don't like that (tours), I like to walk" (Yemen, 20-29, Male)

"And there was also a small authentic moment for me when I just walked next to her down the street and it was actually a part of Soweto that she lives in" (Austria, 20-29, Female)

Ultimately, how tourists who uphold transmodern values (Cultural Creatives) interpret an authentic experience in Soweto is dependent on their ability to procure an intimate encounter with the locals through walking or other intimate interactions.

CONCLUSION

As the tourism industry matures, there is an increasing demand for unique, authentic and meaningful travel experiences (Morrison *et al*, 2017). The newly emerged consumers' sensibility towards authenticity is directly consequential of the current shift in the world consciousness towards self-actualization and authentic-self seen as the fundamental value of transmodernism tourism (Ivanovic & Saayman, 2015:28). Based on the responses of the tourists on the worldview scale and the statistical results, it can be inferred that 54.8% (n=138) of the sample of tourists visiting Soweto can be considered as

close representatives of a Cultural Creatives, while 45.2% (n=114) are general tourists. The findings of this study clearly show that in the South African tourist market, there are two times more (54.8%) Cultural Creatives in Soweto than (26.1%) expected by Ray (2008) in general population and almost three times more (18.3%) than suggested by Ivanovic & Saayman (2015). The second important finding of this study, based on the results of Pearsons-Chi, X^2 (2, n=128) = 9.462; and Crammer V, $p=0.009$ ($V= 0.272$), is that the most authentic experience of Cultural Creatives in Soweto is *walking around the township*. Thirdly, the fact that xenophilism (89.6%), self-actualisation (85.9%) and desire to reconfirm life values (84.5%), emerged as the most agreed values from the world-value scale, serves as a proof that transmodernism is not just some new construct invented by academics but a real value system adopted and endorsed by more than half of tourists visiting Soweto. It also confirms that Cultural Creatives are, in fact, ‘conscious’ travellers – the “new tourists in search for deep transformatory experiences pertinent to new (authentic) transmodern tourism” (Ivanovic, 2014:514). An emphasis on immersive, authentic tourism practices and the potential to encourage the use of local heritage and knowledge in order to meet the new transmodern demand for authentic, is the major finding of this study. However, any development of this nature in South African townships should be approached sensitively, as an act of open dialogue with the locals, and aligned with the values of transmodern tourism (Booyens, 2010; Strydom et al, 2019).

The main recommendation of this study is to focus on the development of transformative tourism offerings such as walking tours allowing tourists to interact with the local community in Soweto by visiting local businesses, various recreational centres and local homes for dining experiences. Therefore, locals should be encouraged to explore becoming hosts (e.g. AirBnB) or rent out accessories (e.g. bicycles, camping gear) and various expertise to travellers to facilitate more meaningful experiences for both travellers and locals. This is not only applicable for Soweto but other historically and culturally significant townships in South Africa and Africa.

Lastly, due to the vast heterogeneity within the groups of Cultural Creatives it is recommended that the future studies related to the transmodern tourism should complement motivations with tourist life values for understanding tourist behaviour and social transformation in various destinations in Africa and South Africa.

REFERENCES

- AfriGis. (2019). Map of Soweto. Available from: <https://maps.google.com/maps/ms?msa=0&msid=2037899731>. (Accessed: 14 June 2019).
- Ateljevic, I. (2009). Transmodernism: Remaking our (Tourism) World? In Tribe, J. *Philosophical Issues in Tourism*. Bristol: Channel View Publications. pp. 278-300.
- Ateljevic, I. (2011). Transmodern Critical Tourism Studies: A Call for Hope and Transformation. *Turismo Em Análise*, 22(3):497-515. <https://doi.org/10.1.1.833.5801>.
- Ateljevic, I. (2013). Transmodernism: Integrating perspective on Societal Evolution. *Futures*, 47:38-48. <http://dx.doi.org/10.1016/j.futures.2013.01.002>
- Booyens, I. (2010). Rethinking Township Tourism: Towards Responsible Tourism Development in South African Townships. *Development Southern Africa*, 27(2):273–287. <https://doi.org/10.1080/03768351003740795>.
- Carvache-Franco, M., Segarra-Oña, M., & Carrascosa-López, C. (2019). Motivations Analysis in Ecotourism through an Empirical Application: Segmentation, Characteristics and Motivations of the Consumer. *Geojournal of Tourism and Geosites*, 24(1):60–73. <https://doi.org/10.30892/gtg.24106-343>.
- Dussel, E. (2002). World-system and ‘Trans’-modernity. *Nepanthia: Views From the South*, 3(2): 221–244.
- Florida, R. L. (2012). *The Rise of the Creative Class, Revisited*. New York: Basic Books.
- George, R. & Booyens, I. (2014). Township Tourism Demand: Tourists’ Perceptions of Safety and Gelter, H. (2010). *Total Experience Management – A Conceptual Model for Transformational Experiences within Tourism*. Conference Proceedings of the Nordic Conference on Experience 2008. Research, Education and Practice in Media: Medusa Group of Vaasa Consortium of Higher Education. Finland: Vaasa, pp. 46-78.
- Ghisi, M. L. (1999). The Transmodern Hypothesis: Toward a Dialogue of Cultures. *Futures*, 31(9-10):879-1016.

- Ghisi, M. L. (2008). *The Knowledge Society: A Breakthrough towards Genuine Sustainability*. Cochin, India: Arunachala Press.
- Ghisi, M.L. (2010). Towards a Transmodern Transformation of our Global Society: European Challenges and Opportunities. *Journal of Future Studies*, 15(1):39-48. [https://doi.org/10.1016/s0016-3287\(99\)00056-7](https://doi.org/10.1016/s0016-3287(99)00056-7).
- Gilmore, J.H. & Pine, J.B. (2007). *Authenticity: What Consumers Really Want?* Boston: Harvard Business School Press.
- Ivanovic, M. (2014). The Perceived Authenticity of Iconic Heritage Sites in Urban Tourism: The Case of Constitution Hill, Johannesburg, South Africa. *Urban Forum*, 25:501-515.
- Ivanovic, M. & Saayman, M. (2015). Authentic Economy Shaping Transmodern Tourism Experience. *African Journal for Physical, Health Education, Recreation and Dance, Supplement 1* (December), pp. 24 -36.
- Jeong, Y., Zielinski, S., Chang, J. S., & Kim, S. I. (2018). Comparing Motivation-Based and Motivation-Attitude-Based Segmentation of Tourists Visiting Sensitive Destinations. *Sustainability*, 10:3615(1-16). <https://doi.org/10.30892/gtg.24105-342>.
- Meconnen, B. (2012). Reinventing the World? Trans-modernity's Emancipatory and Communicative Possibilities. *Ethiopian Journal of the Social Sciences and Humanities*, 8(1):1-30.
- Morrison, A.M. Paulauskaite, D. Powell, R. & Coca-Stefaniak, J.A. (2017). Living like a Local: Authentic Tourism Experiences and the Sharing Economy. *International Journal of Tourism Research*, 19:619–628. <https://doi.org/10.1002/jtr.2134>.
- Nicolaides, A. (2014). Authenticity and the Tourist's Search for Being. *African Journal of Hospitality, Tourism and Leisure*, 3(1):1-11.
- Pallant, J. (2011). *SPSS Survival Manual: A Step by Step Guide to Data Analysis Using the SPSS Program*. (4th Ed). Berkshire: Allen & Unwin.
- Pine J.B. & Gilmore, J.H. (2012). *The Experience Economy: Work is Theatre & Every Business a Stage*. Boston: Harvard Business School Press.
- Pritchard, A. Morgan, N. & Ateljevic, I. (2011). Hopeful Tourism: A New Transformative Perspective. *Annals of Tourism Research*, 38:941-963. <https://doi.org/10.1016/j.annals.2011.01.004>.
- Rahi, S. (2017). Research Design and Methods: A Systematic Review of Research Paradigms, Sampling Issues and Instruments Development. *International Journal of Economics & Management Science*, 6(2):1-5. DOI: 10.4172/2162-6359.1000403.
- Ramchander, P. (2007). Township Tourism: Blessing or Blight? The Case of Soweto in South Africa. In G. Richards (Ed.), *Cultural Tourism: Global and Local Perspectives* New York: Haworth Press, pp.39–67.
- Ray, H. P. (2008). *The Potential for a New, Emerging Culture in the U.S*. Report on the 2008 American Values Survey. 19p. Available from: <https://www.wisdomuniversity.org/CCsReport2008SurveyV3.pdf>. (Accessed: 21 May 2019).
- Ray, H. P. & Anderson, S. R. (2000). *The Cultural Creatives: How 50 Million People Are Changing the World?* New York: Harmony Books.
- Reisinger, Y. (2015). Preface. In Y. Reisinger (Ed.). *Transformational Tourism: Host Perspectives*. pp. Xii–Xiii. Wallingford: CABI.
- Richards, G. (2011). Globalisation, Localisation and Cultural Tourism. Tram-Research. Available From: www.aumed.net/richards.pdf. (Accessed: 21 May 2019).
- Rifkin, J. (2005). *The European Dream: How Europe's Vision of the Future is Quietly Eclipsing the American Dream*. New York: Penguin Group.
- Robledo, M. A., & Batle, J. (2017). Transformational Tourism as a Hero's Journey. *Current Issues in Tourism*, 20(16):1736–1748. <https://doi.org/10.1080/13683500.2015.1054270>.
- Rodríguez, M. R. (1989). *La Sonrisa De Saturno: Hacia una Teoría Transmoderna*. Barcelona: Anthropos.
- Rodríguez, M. R. (2017). *Transmodernity: A New Paradigm* (translated). Available From: <http://transmoderntheory.blogspot.com.es/2017/05/transmodernity-new-paradigm.html/>. (Accessed: 21 May 2019).
- SAT, South African Tourism. (2017). *2016 Annual Tourism Report*. Johannesburg: SAT.
- Stats SA. (2018). *Tourism and Migration. Statistics Release, January*. Pretoria. StatsSA. Available From: <http://www.statssa.gov.za/publications/p0351/p0351january2018.pdf>. (Accessed: 21 May 2019).
- Strydom, A.J., Mangope, D., & Henama, U.S. (2019). Making Community-Based Tourism Sustainable: Evidence from the Free State Province, South Africa. *Geojournal of Tourism and Geosites*, 24(1), 7–18.
- Tomljenovic, R. (2015). *Transformative Tourism: Theoretical and Methodological Review*. Available From: <https://www.researchgate.net/publication/299489264>. (Accessed: 21 May 2019).
- Welzel, C. (2006). *A Human Development View on Value Change Trends (1981–2006)*, International University Bremen (IUB). Istanbul Presentation Held Professor of Political Science, November 03, 2006. Available From: www.worldvaluessurvey.org (Accessed: 21 May 2019).
- Wolf, I. D. Ainsworth, G. B. & Crowley, J. (2017). Transformative Travel as a Sustainable Market Niche for Protected Areas: A New Development, Marketing and Conservation Model. *Journal of Sustainable Tourism*, 25(11):1650–1673. <https://doi.org/10.1080/09669582.2017.1302454>.

THE CONTRIBUTION OF GEOLOGICAL FEATURES TO VISITOR EXPERIENCES: COMPARISON BETWEEN TWO GEOTOURISM ATTRACTIONS IN SOUTH AFRICA

Elizabeth Ann DU PREEZ*

Division Tourism Management, Department of Marketing Management,
University of Pretoria South Africa, e-mail: elizabeth.dupreez@up.ac.za

Citation: Du Preez E. A., (2019). THE CONTRIBUTION OF GEOLOGICAL FEATURES TO VISITOR EXPERIENCES: COMPARISON BETWEEN TWO GEOTOURISM SITES. *GeoJournal of Tourism and Geosites*, 26(3), 1006–1020. <https://doi.org/10.30892/gtg.26325-413>

Abstract: Geotourism offers the opportunity to promote geoconservation as well as an understanding of geoheritage and -diversity. Though sites may have high quality geological resources, visitors to these sites have varied interests and motivations to visit. As such, the geological features of an attraction may make varied contributions to visitors' experiences. Understanding these differences will aid in determining how specific features should or could be enhanced to facilitate the most appropriate experience dimensions. Aspects such as the content, learning, visitor management and fulfilment are argued to be especially relevant in the geotourism context. This paper explores these perception in the case of two diverse geosites namely the Augrabies Waterfall and Cradle of Humankind, South Africa. Results indicate how specific geological features and representation thereof contribute differently to visitors' experiences. Recommendations for future research are made.

Keywords: geotourism, geological sites, tourist experiences, measurement scale, Augrabies National Park, Cradle of Humankind.

* * * * *

INTRODUCTION

Africa is endowed with rich natural and cultural resources ideal for the promotion of the tourism industry in countries faced with numerous challenges to do so (Jacinto & Du Preez, 2018). The continent boasts some of the world's major geosites (Anhaeusser et al., 2016), yet limited measures seem to be in place to protect and promote awareness of continental geoheritage (UNESCO Global Geopark data presented in Ruban, 2017). Tourism activities are one way in which national geodiversity can be exploited (Ruban, 2017). Despite the suitability of geotourism as a product offering for African destinations as well as its potential to contribute to socio-economic development (Farsani et al., 2011; Mukwada & Sekhele, 2017; Ngwira, 2015; Schlüter & Schumann, 2018), academic literature representing the African geotourism perspective is scant (Ruban, 2015).

* Corresponding author

First introduced publicly in 2002, geotourism is a relatively new type of tourism with growth potential (Farsani et al., 2011; Hose et al., 2011; Mukwada & Sekhele, 2017; Ngwira, 2015), and is defined as "tourism of geology and landscape usually undertaken at geosites. It fosters conservation of geological attributes (geoconservation) as well as understanding of geoheritage and geodiversity (through appropriate interpretation)" (Dowling & Newsome, 2018:8). As a small-scale niche tourism product it offers unique experiences (Robinson & Novelli, 2005), and overlaps with other growing niches such as eco-, alternative-, educational-, nature-based- and heritage tourism (Dowling & Newsome, 2018; Hose et al., 2011). When only focusing on the abiotic elements (geology, landforms and climate), it can be defined as geological tourism. The wider geotourism spectrum however not only includes the abiotic, but also the biotic (fauna and flora) as well as cultural (people past and present) elements (Dowling & Newsome, 2018). People are said to engage with geology and geomorphology through landscapes and tourism in an experiential way and, as such, successful geotourism depends on the quality of the visitor experience through making it meaningful and memorable (Gordon, 2018). The question remains as to how geological features contribute to tourists' experiences at attractions (after Assaf & Josiassen, 2012). As experiences depend on both the individual and the context (Knobloch et al., 2014), there is no guaranteed format for the delivery of memorable experiences. This paper explores the manner in which geological features form part of visitors' experiences at two diverse attractions. Focus is on four dimensions of geotourism experiences namely content, learning, visitor management, and fulfilment.

LITERATURE REVIEW

Different attractions present different benefits (experiences) to tourists according to the nature of the offering, with the primary features being the drawing cards (Benur & Bramwell, 2015). Visitor expectations play an important role as individuals anticipate certain traits of the attraction visited (Larsen, 2007), and the extent to which the attraction features meet these expectations will either cause satisfaction or dissatisfaction (Mathis et al., 2016). Tourists' motivations to travel also link to their levels of satisfaction as an outcome of what they have experienced (Benur & Bramwell, 2015; Knobloch et al., 2014). These motivational factors translate into the aspects considered when measuring tourists' experiences (Pearce & Lee, 2005).

The aim of any tourist attraction should be to deliver an experience that leaves a positive memory (Chandralal & Valenzuela, 2013; Vittersø et al., 2000). Enhanced experiences involve tourists emotionally, physically, spiritually and intellectually (Prebensen et al., 2014), and comprise both tangible and intangible aspects. Various dimensions of memorable and meaningful experiences have been identified (see Chandralal & Valenzuela, 2013; Cornelisse, 2014; Hosany et al., 2015; Kim et al., 2012; Knobloch et al., 2014; Park & Santos, 2017; Poria et al., 2004; Tung & Ritchie, 2011). The more the various sub-dimensions of these dimensions are met, the greater the chance of overall memorable experience (Knobloch et al., 2014). The importance and experience of geological features will vary between visitor groups, where for some it is the focus of the visit while others engage with the content incidentally (Dowling & Newsome, 2018; Gordon, 2018; Grobbelaar et al., 2019; Hose, 2016). The characteristics of the geological features and manner in which tourists engage with content will contribute to the experience (Newsome et al., 2012). In the case of geotourism sites, aesthetics, emotional value, authenticity, uniqueness, visual value and support services apply specifically (Štrba, 2015). Other aspects known to influence satisfaction with natural and cultural resources include perceived authenticity (Cornelisse, 2014; Štrba, 2015); unusual / rarity

/ novelty (Chandralal & Valenzuela, 2013; Kim et al., 2012; Knobloch et al., 2014; Štrba, 2015); variety / diversity (Gordon, 2018; Kruger et al., 2015); identification (Kruger et al., 2015); proximity of viewing (Hose, 2002; Kruger et al., 2015). Learning and gaining knowledge is one of the major benefit sought at geosites (Hose, 2012), and visitors are likely to rate their experiences higher if they have learned something about the landscape and geology visited (Dowling & Newsome, 2018). Intellectual development through changed perspectives is regarded as one of the most significant components of memorable experiences (Tung & Ritchie, 2011), but may not be the strongest contributor (Knobloch et al., 2014). Learning is strengthened if a visitor can engage with the content of the attraction in a desirable manner (Ham, 2016). In the geotourism context, interpretation is one of the key components (Hose, 2012; Newsome et al., 2012).

Well-planned and –designed interpretation of heritage should be able to meet the needs of the range of visitors (casual to expert) at a geotourism site (Gordon, 2018; Grobbelaar et al., 2019; Hose, 2016). When interpreting geosites it is important that the descriptions should provide a holistic perspective of the site and that the geology should be clearly and easily explained. Various tools can be used toward this goal including literature, signage, tour guides, audio guides and interpretive centres (Dowling & Newsome, 2018; Newsome et al., 2012). Tourists increasingly seek meaningful experiences such as a sense of physical, emotional, or spiritual fulfillment (Kang et al., 2008) and this can be achieved through broadening one's thinking of life and society (Chandralal & Valenzuela, 2013; Uriely, 2005). When meaningfulness is enhanced, experience will become more memorable and likely to last longer (Park & Santos, 2017; Tung & Ritchie, 2011; Tsiotsou & Goldsmith, 2012). Geosites offer tourists the opportunity to experience fulfilment through deep connections with places, humanity and the natural world (Gordon, 2018). Interactive engagement with and interpretation of content is necessary to foster these deeper meanings (Gordon, 2018; Poria et al., 2001).

STUDY AREAS

South Africa features a great variety of geological wonders; with some already developed into tourist attractions (Knight et al., 2015). Two study areas with significant geosites in diverse settings were chosen: Auwabies Waterfall in the Northern Cape and Cradle of Humankind in the province of Gauteng, South Africa. Auwabies is a 56m waterfall in the Orange River with a name derived from the Nama word “Aukoerebis” meaning the “Place of Great Noise.” It is an undoubted geotourism attraction (after Ortega-Becerril et al., 2019; Schutte, 2009) and can be viewed within the 820 km² Auwabies Falls National Park (Figure 1). The area forms part of the Namaqua-Natal tectonic Province (Colliston et al., 2015) and features and offerings within the Park's 55 383 hectares include the waterfall (Figure 2), gorge (Oranjekom and Ararat as main viewpoints) (Figure 3); rock formations with Moon Rock (Figure 4) and Swart Rante (Black Hills) (Figure 5) as prominent features; panoramic viewpoints; cultural heritage sites (Early, Middle and Late Stone Age; San and Khoi; first European settlers); fauna and flora; as well as some leisure activities (Pinchuck et al., 2002). The Falls were thought to be formed some 1.8 million years ago, progressively cutting back along faults in the Riemvasmaak gneiss of Proterozoic age. Rocky hills in the central portion are said to be formed by dark quartz-rich granulite and metagabbros, and the metagabbros is composed of dark minerals (amphibole, biotite). The Auwabies gneiss consists of microcline and plagioclase with varying amounts of biotite and hornblende and with rare opaque minerals (apart from allanite which is a common accessory mineral). The Auwabies Falls area is also characterized by faults, micro-faults, and parallel joint sets

(Madi, 2016). The Cradle of Humankind (Figure 6), one of South Africa's eight UNESCO World Heritage Sites, is the world's richest hominin site housing around 40% of the world's human ancestor fossils across 13 major fossil sites within the 47 000 hectares of land (Norman, 2013; Schutte, 2009). The two most visited sites are the Maropeng Visitor Centre and Sterkfontein Caves. Maropeng with its signature building known as the Tumulus (Figure 7) houses an exhibition centre taking visitors on a journey of discovery to learn more about, and challenge thinking around the origins of humankind (Lelliott, 2016). Visitors have the opportunity to view original hominid and dinosaur fossils, as well as ancient artefacts such as 2-million-year-old stone tools.

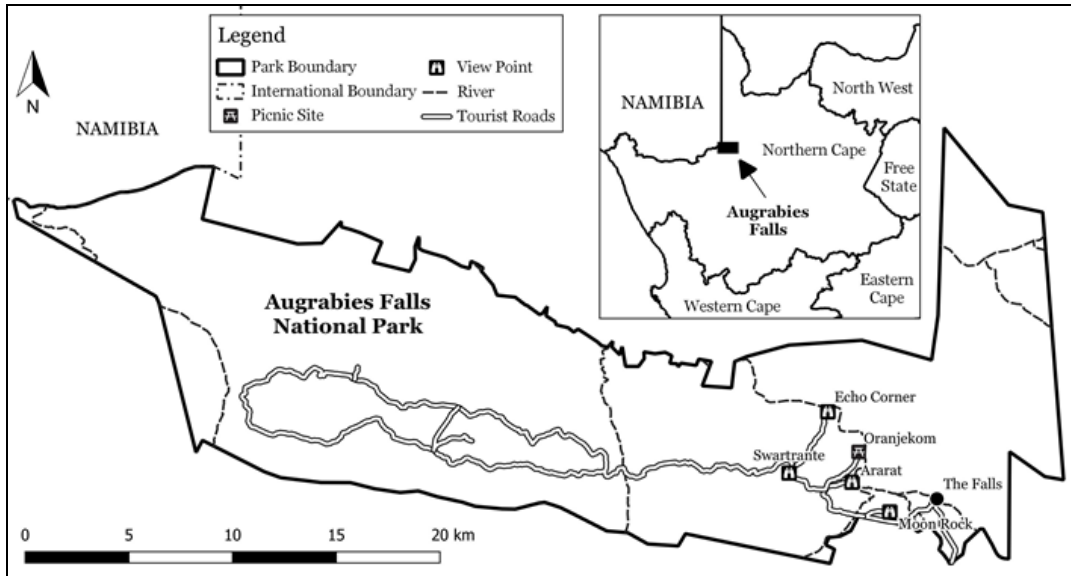


Figure 1. Map of Augrabies National Park



Figure 2. Augrabies Waterfall



Figure 3. Oranjekom and Ararat



Figure 4. View from Moon Rock

Figure 5. View of Swart Rante (Black Hills)

Maropeng is a short drive from the fossil-rich Sterkfontein Caves and visitors usually combine these two sites (Schutte, 2009). Sterkfontein Caves formed in the 2.6 Ga dolomitic limestone of the Malmani Subgroup and contains the richest repository of *Australopithecus* fossils in the world (Stratford et al., 2016). Two historically significant fossils among others found in the area are that of “Mrs Ples” and “Little Foot”.

The 2.5-million-year-old australopithecine skull known as “Mrs Ples” (*Australopithecus africanus*) provided proof that *Australopithecus* could be classified as a member of the Hominidae (replica at Maropeng displayed in Figure 8). “Little Foot” is an almost complete australopithecine skeleton aged around 4.17 million years (replica at Maropeng displayed in Figure 9) (Schutte, 2009). On a guided underground tour of part of the cave system (Figure 10, 11, 12), account is given of how the fossils were found (Norman, 2013). Neither the excavation sites for “Little Foot” (Figure 13) nor “Mrs Ples” (Figure 14) are accessible to visitors as work continue across the cave network (Stratford, et. al., 2016). After eighty years of paleoanthropological research, many areas of the cave system remain either unexplored or only superficially sampled (Stratford, 2018); implying continued geological tourism potential. Though scientific findings have been published on the area and it holds geotourism potential (Schutte, 2009), there is a dearth in literature from a visitor perspective (Lelliott, 2016).

MATERIALS AND METHODS

Data were collected using self-administered questionnaires in face-to-face interactions with visitors over three days at both sites. Non-random sampling was employed to solicit individuals through interception at various key points across the attractions.

The Contribution of Geological Features to Visitor Experiences:
Comparisons Between Two Geotourism Attractions in South Africa

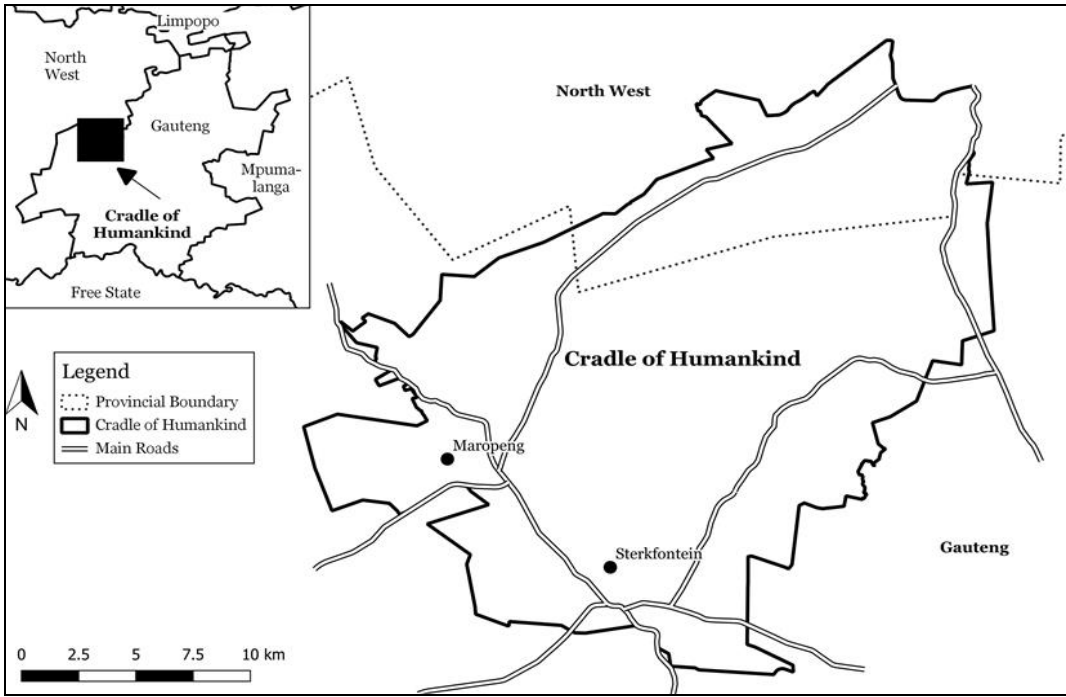


Figure 6. Map of Cradle of Humankind indicating Maropeng and Sterkfontein



Figure 7. Maropeng visitor centre main



Figure 8. Replica of „Mrs Ples”



Figure 9. Replica of „Little Foot”



Figure 10. Cave tour entrance



Figure 11. Descent



Figure 12. Cave exhibit with bust of Robert Broom and Mrs Ples

**Figure 13.** „Little Foot” excavation site**Figure 14.** „Mrs Ples” excavation site

In case of Augrabies this included viewpoints and hospitality areas such as picnic sites and restaurants. At CH data collection took place at both Maropeng and the Sterkfontein Caves but ensuring that visitors were not included twice. Interaction took place throughout the various exhibitions and hospitality facilities. At both attractions, fieldworkers aimed to collect a heterogeneous sample based on age, gender and race, as well as approaching visitors after they had spent enough time to be able to evaluate their experiences. The questionnaire contained a section on demographics and frequency of visit (categorical), as well as visitors' 'top-of-mind' thoughts of the attraction (open-ended; analysed through thematic analysis). Twenty items (derived from literature) were used to measure the four dimensions of tourists' experiences: 'content' (six items), 'learning' (6 items), 'visitor management' (five items) and 'fulfilment' (three items) (agreement measured from 1 = strongly disagree to 5 = strongly agree). Specific features of each site were identified from the attractions' websites and respondents had to indicate whether they had experienced these (yes/no), as well as rating their experience of these features (1 = extremely negative to 5 = extremely positive). Lastly they had to indicate which aspects of the attraction contributed to making their visit memorable (1 = not contributing at all to 5 = contributing greatly). Descriptive data analysis described the samples and responses to the various questions. Exploratory Factor Analyses (EFA) (Maximum Likelihood extraction with Varimax rotation) identified factors emerging for the constructed 20-item tourist experience scale (EFA conducted for combined dataset).

Suitability of the data for EFA was investigated at the hand of Bartlett's test of sphericity (significant at 0.05 or smaller) and the Kaiser-Meyer-Olkin (KMO) measure of sampling adequacy (exceeding 0.6). Factors that reported Eigenvalues of 1 or more were retained. A cut-off of 0.3 for factor loadings was used (Pallant, 2016).

Reliability of the various factors were tested using Cronbach Alpha (coefficient > 0.60) (Taber, 2017). The four factors were then applied to determine the differences in ratings between the two attractions (reliability of the applied scale confirmed using Cronbach Alpha). Significance of the difference in ratings of the experience dimensions between parks were tested at the hand of t-tests ($p=0.05$) (Pallant, 2016).

RESULTS DISCUSSIONS

The results sections consist of three parts. Firstly, descriptive results for the samples and evaluation of site-specific features per park, followed by EFA of the experience scale and lastly, comparing the ratings of the experience dimensions between the attractions.

Sample description

The total sample included 307 respondents: 107 for Augrabies Falls National Park (ANP) and 200 for Cradle of Humankind (CH) (of which 159 were from Maropeng Interpretation Centre and 41 Sterkfontein Caves. Majority of respondents at ANP were male (62%), aged between 36 -50 (51%), with a secondary school/matric qualification (37%), domestic travellers (94%), day visitors (68%) and repeat visitors (82%). Majority of the respondents at CH were male (51%), aged between 36 – 50 (46%), with a postgraduate degree (34%), domestic travellers (72%), day visitors (89%) and first time visitors (61%).

Evaluation of geological features experienced at ANP

Visitors' 'top-of-mind' connotations with the park included the waterfall (48 mentions); nature (9); animals and birds as well as monkeys/baboons (8). Reference was also made to the peace / tranquillity / beauty of the surroundings. Also mentioned were the rock formations, people/party, and the swimming pool (keeping in mind that a large contingency of the respondents were local repeat visitors that frequent the park as recreational facility). Respondents were asked to rate the performance of specific geological features that they have experienced. Table 1 depicts these features, the percentage of visitors that have experienced them as well as the mean score (with five being the upper-end of the scale). The vast majority of visitors have experienced the waterfall, also giving it the best score. This is followed by the two prominent rock formations 'Swart Rante' (Black Hills) and 'Moon Rock'; with the former given a greater score despite being the least experienced than the three remaining features (the last two being viewpoints). Overall, respondents' experience of the geological features were extremely positive.

Table 1. Performance of site features: ANP*

Specific features	Experienced (%)	Performance (Mean score)
The Falls	98	4.49
Swart Rante (Black Hills)	38	4.31
Moon Rock	50	4.27
Oranjekom & Ararat	48	4.26
Echo Corner	48	4.24

Table 2. Aspect contributing to an overall MTE: ANP

Aspect	N	Mean
Rock formations	105	3.88
The landscape	105	3.82
Culture and heritage	103	3.66
Plants	103	3.64
Trees	104	3.60
Birds	103	3.58
Animals	104	3.49

Respondents had to indicate the aspects they felt contributed to having an overall MTE (depicted in Table 2). In line with the performance scores, the rock formations and landscape featured stronger than cultural and biotic aspects (after Dowling & Newsome, 2018). Though the latter featured relatively stronger than the rock formations as 'top-of-mind' thoughts, they contributed less to an overall MTE; arguably alluding to the perceived quality or uniqueness of the geological features compared to other aspects once experienced. This corroborates literature indicating that aspects leading to satisfaction with natural resources include perceived authenticity (Cornelisse, 2014) and

unusual/rare (Chandralal & Valenzuela, 2013; Kim et al., 2012; Knobloch et al., 2014). Interestingly, the items given did not contribute that much to the memorable tourism experience overall (based on relatively lower mean scores). This may be that many of the respondents were day visitors who visited Augrabies for recreational purposes. As such, other components of MTEs such as hedonism and refreshment may become more important (Kim et al., 2012) and the visitors engage with geological content incidentally (Dowling & Newsome, 2018; Gordon, 2018; Grobbelaar et al., 2019; Hose, 2016).

Evaluation of geological features experienced at CH

Visitors' 'top-of-mind' descriptors included evolution / beginning of humankind / where do we come from (50 mentions); history (43 mentions); and skulls/fossils/Mrs Ples (40). Least used were interactive / entertaining / interesting (19) and being a 'cradle' and the caves (16) (keeping in mind that the majority of visitors were interviewed at Maropeng). Respondents were asked to rate the performance of specific geological features and exhibitions that they have experienced.

Table 3 depicts these features, the percentage of visitors that have experienced them as well as the mean score (with five being the upper-end of the scale). Overall, respondents' experience of the features were extremely positive. Three of the four highest rated aspects reflect the 'top-of-mind' descriptors, presenting 'evolution' were rated highest (corroborating the findings of Stratford, 218); arguably indicating successful messaging of the main purpose of the attraction (after Larson, 2007). Similar to the rock formations at Augrabies, the caves received a very high score despite being one of the least mentioned aspects associated with the attraction. Though the visitor centre were the most visited, it received a lower rating. This could link to the low use of descriptions such as interactive / entertaining / interesting.

Table 3. Experience of specific features: CH

Specific features / exhibitions	Experienced (%)	Performance (Mean score)
Beginning of the world (Maropeng)	81	4.48
Cave interior (Sterkfontein)	61	4.37
Path to humanity (Maropeng)	82	4.36
Mrs Ples and Little Foot (Replicas at both Maropeng and Sterkfontein)	63	4.31
What makes us human (Maropeng)	80	4.29
Museum fossil exhibition (Maropeng temporary displays)	61	4.27
Excavation sites (Sterkfontein)	57	4.25
Homo Naledi fossil display (Maropeng)*	55	4.18
Pathway to caves (Sterkfontein)	62	4.16
Sustainability (Maropeng)	78	4.13

*Fossils of a newly found species, Homo naledi, on display at time of the survey

Homo naledi (Maropeng), pathway to the caves (Sterkfontein) and Sustainability exhibition (Maropeng) received the lowest performance ratings (despite the caves itself receiving a high rating). Though the findings of a new species, Homo naledi, were a historical event and the fossils temporarily on display, it received a relatively lower score. Pathway to the caves is a 200 meter cement path with information plaques displayed along the way. These two ratings allude to importance of the desired format of engagement with the content and would require further investigation to understand shortcomings in the existing versions (Ham, 2016). The 'sustainability' exhibition forms the last part of the exhibition hall, received the lowest score and also didn't feature in the

The Contribution of Geological Features to Visitor Experiences:
Comparisons Between Two Geotourism Attractions in South Africa

‘top-of-mind’ connotations with the attraction. Greater emphasis or alternate ways of presenting this theme would be necessary to ensure geoconservation and sustainable resource use as key outcomes of geotourism (Dowling & Newsome, 2018).

Respondents had to indicate the aspects they felt contributed to having an overall MTE (depicted in Table 4). Respondents had positive sentiments regarding the contribution of the aspects to an overall memorable experience.

Table 4. Aspect contributing to an overall MTE: CH

Aspect	N	Mean
Knowledge: origin of humans	185	4.40
Knowledge: history of mankind	185	4.30
Awe at the age of the Earth	185	4.17
Knowledge: archaeological sites	185	4.16
Connectedness to humankind	185	4.04

Table 5. EFA results for experience factors (overall dataset)

Factor Matrix ^a				
Experience factors*	Factor			
	Content	Learning	Visitor management	Fulfilment
1. Surprised by unusual things	.311			
2. Guided by rules to behave appropriately	.397			
3. See different kinds of animals/species/exhibits	.398			
4. Experience wildlife/nature in its natural state	.435			
5. Come as close as possible to wildlife/nature/artefacts	.574			
6. Am excited by viewing rare species of animals/plants/artefacts	.423			
7. Learn via engaging with other visitors		.431		
8. Learn via an articulate guide		.629		
9. Learn via talks		.817		
10. Learn via literature		.837		
11. Learn via interpretation facilities		.618		
12. Learn via audio guide		.637		
13. Receive good information (maps, brochures, signage)			.416	
14. Easily view animals/nature/artefacts in predictable locations			.501	
15. Easily view exhibits in a well-structured layout			.983	
16. Can easily move between different sightings/exhibits/ areas			.618	
17. Am able to spend as much time as I want in the same location viewing my favourite animal/plant/exhibit			.304	
18. Connect with nature				.436
19. Connect with history				1.000
20. Connect with mankind				.561
Mean	0.423	0.662	0.564	0.666
Cronbach Alpha (all factors proving reliable)**	.801	.877	.747	0.684

Extraction Method: Maximum Likelihood

a. 4 factors extracted. 24 iterations required.

* Wording was adapted to reflect the nature of the attraction (e.g. see different kinds of animals / species for ANP versus see different kinds of exhibits for CH)

** Though the Alpha for fulfilment did not meet the 0.7 threshold it could still be regarded valid (Taber, 2017).

The attraction manages to successfully facilitate learning which is regarded as a key contributor to memorable experiences (Kim et al., 2012; Tung & Ritchie, 2011), and one of the major benefit sought at geosites (Hose, 2012). It corroborates Dowling and Newsome (2018)'s statement that visitors are likely to rate their experiences higher if they have learned something about the geology visited. This finding arguably matches the visitor profile sampled, namely travellers with a high level of education (postgraduate degree) and possibly seeking intellectual stimulation; as well as being first time visitors who are 'awed' when first being exposed to the content.

Exploratory factor analysis of the experience scale

Respondents had to rate twenty aspects during their visit, with the items relating to the four possible dimensions as derived from the literature (1 = strongly disagree; 5 = strongly agree).

Table 6. Rating of experience dimensions

Experience aspects	ANP			CH			t
	N	Mean	Std Dev	N	Mean	Std Dev	
Content:							
1. Unusual things	105	4.21	.906	191	4.09	.857	1.134
2. Guided by rules	105	4.27	.847	187	4.13	.975	1.218
3. Variety	104	4.21	.910	188	4.24	.841	-.263
4. Authenticity	105	4.30	.854	189	4.07	1.153	1.761
5. Close encounters	104	4.23	.839	188	4.25	.951	-.172
6. Rarity	104	4.07	.927	189	4.31	.917	-2.131**
Composite score	105	4.21	.647	193	4.19	.684	.238
Cronbach Alpha		.822			.793		
Learning via:							
7. Engaging with other visitors	106	4.02	1.069	190	3.92	1.294	.698
8. Articulate guide	107	3.92	1.260	190	4.50	1.107	-4.152*
9. Talks	107	3.85	1.358	190	4.23	1.153	-2.527**
10. Literature	107	3.90	1.400	190	4.22	1.084	-2.183**
11. Interpretation facilities	107	3.81	1.487	191	4.20	1.103	-2.583*
12. Audio guide	107	3.91	1.634	189	4.20	1.305	-1.699
Composite score	107	3.90	1.143	194	4.23	.886	-2.730*
Cronbach Alpha		.909			.845		
Visitor management:							
13. Good information (maps, brochures, signage)	105	4.46	.797	188	3.91	1.076	4.516*
14. Easily view in predictable locations	105	4.11	.870	178	4.09	1.268	.174
15. Easily view in a well-structured layout	105	4.21	.863	186	4.21	.961	-.001
16. Easily move between areas	105	4.36	.822	184	4.24	.848	1.197
17. Sufficient viewing time	104	4.32	.895	187	4.24	1.006	.648
Composite score	105	4.29	.636	190	4.13	.705	1.952
Cronbach Alpha		.806			.723		
Fulfilment through deep connection with:							
Nature	105	4.40	.905	188	4.26	1.040	1.151
History	103	4.05	.943	185	4.41	.881	-3.261*
Mankind	101	4.21	.983	185	4.51	.788	-2.867*
Composite score	105	4.23	.752	190	4.40	.716	-2.010**
Cronbach Alpha		.701			.686		

*p<.01 **p<.05

In order to compare the ratings on the experience dimensions (content, learning, visitor management and fulfilment), an EFA was conducted for the combined dataset. The data proved suitable for an EFA (KMO = .852; Barlett's Test $p < 0.0001$). Maximum Likelihood analysis (Table 5) converged into the four experience factors with Eigen values exceeding 1, explaining 50% of variance. The EFA results (Table 5) indicate the items under each factor. The experience of fulfilment features strongest across the two sites (0.666), followed closely by learning (0.662).

Differences between the attractions' rating on the four experience dimensions

As the four factors were confirmed by the EFA, they could be applied to evaluate the ratings per site. Table 6 presents the mean scores of all of the items per attraction. It also indicates the items that presented significant differences between the two attractions, as well as for the overall factors (based on composite scores). Cronbach Alpha score were also calculated for the scales per site and confirmed reliability.

Based on the composite scores of the factors the two attractions differed significantly in terms of 'learning' and 'fulfilment'; with CH scoring greater in both instances. CH clearly facilitated learning to a greater extent than ANP in most aspects. Though not significant, engagement with other visitors featured stronger for ANP, corroborating previous findings that visitors to the park were more focused on a leisure experience than learning and also with the geological features not contributing as much to the overall experience. CH also facilitated deep connections to a greater extent, accept in the case of 'nature' which makes sense when considering the stronger feature of biotic features at ANP. Two other individual aspects that differed significantly were 'rarity' with content at CH regarded scarcer; while 'information through maps, brochures and signage' were regarded as better at ANP. Overall, these two attractions provided visitors with similar contributions of desirable content and effective visitor management. These two ratings indicate both sites' potential to facilitate MTEs through the desired format of content (Ham, 2016), as well as effective layout of facilities (after Newsome et al., 2012).

CONCLUSION

Findings of the study illustrate that experience of the geological features vary between attractions based on the site context and visitor type (corroborating Dowling & Newsome, 2018; Gordon, 2018; Grobbelaar et al., 2019; Hose, 2016). The scale identified similarities and differences across the sites, both in terms of complete factors (learning and fulfilment) as well as three individual aspects meaningfully explained against the characteristics of the attractions. The performance of the scales, in turn, matched the initial evaluations of the sites based on the importance and performance of the geological features. In the case of Augrabies Waterfall, visitors' 'top-of-mind' connotations with the park included the waterfall (abiotic feature) and fauna and flora (biotic features).

The vast majority rated the performance of the waterfall as best, followed by two prominent rock formations (all being abiotic features). In line with the performance scores, the rock formations and landscape featured stronger than cultural and biotic aspects (after Dowling & Newsome, 2018). The site could fall within the broader scope of geotourism for tourists that visit the park specifically for geotourism purposes (after Dowling & Newsome, 2018). For the visitor profile sampled, however, other experience dimensions such as refreshment may become more important for this attraction (after Kim et al., 2012). Connection with other visitors through shared experiences would also be important, especially for leisure visitors (after Chandralal & Valenzuela, 2013; Knobloch et al., 2014). Aquino, Schänzel and Hyde (2018) highlighted the importance of these socio-

cultural dimensions of geotourism experiences. Visitor engagement with geological content may be incidental (Dowling & Newsome, 2018; Gordon, 2018; Grobbelaar et al., 2019; Hose, 2016), yet should be presented in a manner that simultaneously allows socialization. There may be an opportunity to engage these visitors with geological features through more 'landscape leisure' activities suitable to the environment (Serrano & Trueba, 2011). Aesthetics and visual value will be prominent aspects of visitors' experiences of the geological features (after Štrba, 2015). Visitors' 'top-of-mind' descriptors for CH included evolution / beginning of humankind, corroborating the findings of Stratford (2018) and indicating successful messaging of the main purpose of the attraction (after Larson, 2007). Similar to the rock formations at Augrabies, the caves received a very high performance score despite being one of the least mentioned aspects associated with the attraction.

The 'sustainability' exhibition received the lowest score as well as not featuring in the 'top-of-mind' connotations, indicating an opportunity to place greater emphasis on geoconservation and sustainable resource use as key outcomes of geotourism (Dowling & Newsome, 2018). In the case of CH, abiotic aspects featured strongest, making the site appropriate as a geological tourism site as opposed to a geotourism site in the wider sense (after Dowling & Newsome, 2018). Respondents had positive sentiments regarding the contribution of the aspects measured to an overall memorable experience, with the site successfully facilitating learning as major benefit sought at geosites (Dowling & Newsome, 2018; Hose, 2012). Again, the finding could be interpreted against the visitor profile sampled: domestic day visitors with a high level of education (postgraduate degree) and possibly seeking intellectual stimulation; as well as being first time visitors who are 'awed' when first exposed to the content. The proposed dimensions ('content', 'learning', 'visitor management', and 'fulfilment') were supported through an EFA converging into the four reliable factors. Factor one, content, presents the characteristics of the geological features and include perceived authenticity (corroborating Štrba, 2015); unusual / rarity / novelty (after Chandralal & Valenzuela, 2013; Kim et al., 2012; Knobloch et al., 2014; Štrba, 2015); variety / diversity (Gordon, 2018; Kruger et al., 2015); identification (Kruger et al., 2015) and proximity of viewing (Hose, 2002; Kruger et al., 2015). Factor 2, learning, relates strongly to the forms of interpretation through various mediums, with knowledgeable guides featuring strongly (corroborating Hose, 2012 and Gordon, 2018).

Factor 3, visitor management, relates to site information, ease of viewing and movement; supporting Gordon's (2018) emphasis on well-planned and -designed interpretation that meets visitor needs. The last factor, fulfilment, relates to a deep connection (after Kang et al., 2008) with nature, history and mankind especially in the geotourism context (corroborating Gordon, 2018). It highlights the importance of the emotional value ("Objects related to famous persons or event of global / international / national significance") (see Štrba, 2015). A limitation to the study is the relatively small sample size, along with the fact that it was cross sectional. This brings limitations to the generalizability of the findings to the broader visitor market.

Point in case is that the visitors at ANP were predominantly locals who frequented the park for leisure purposes. Though the geological features formed a greater part of their experience that the fauna and flora, they would not necessarily attach the same value to interpretation services than those specifically coming to the park to view the geological features (waterfall and rock formations). Applying the survey across different tourism peak periods will ensure representation of tourist types. Relationships between tourist motivations and satisfaction with experiences can also be tested. The current four factors (experience dimensions) only accounted for 50% of the variance. Opportunities for further research include expansion of the scale to measure other key components of experiences

including intangible aspects such as local culture (after Kim et al., 2012; Park & Santos, 2017; Tung & Ritchie, 2011). The latter may play a significant component as culture (represented through people – past and present – from the region) forms part of the broader geotourism continuum (Gordon, 2018). Involvement is another dimension that can add value, given the relationship between co-creation and experiential value (Barnes et al., 2019). Comparing different geotourism contexts to explore variations in experiences can be meaningful. Lastly, quality of the geological features can be measured at the hand of criteria as done by Štrba (2015) as well as Dony et al. (2015).

Acknowledgements

Mr Arno Booyzen for assistance with cartographic images. This paper forms part of a larger research project on memorable tourism experiences undertaken by the Division Tourism Management, University of Pretoria. For contribution to the research instrument and fieldwork: Prof Berendien Lubbe, Prof Felicité Fairer-Wessels and Prof Anneli Douglas.

REFERENCES

- Dony, A., Busu, I., Hafzan, E., & Muqtada, M. (2015). Geoheritage as the basis for geotourism development: a case study in Jeli District, Kelantan, Malaysia. *GeoJournal of Tourism and Geosites*, 1(15), 25-43.
- Anhaeusser, C.R., Viljoen, M.J., & Viljoen, R.P. (eds) (2016). Africa's Top Geological Sites. Struik Nature, Cape Town.
- Aquino, R.S., Schänzel, H.A., & Hyde, K.F. (2018). Unearthing the geotourism experience: geotourist perspectives at Mount Pinatubo, Philippines. *Tourist Studies*, 18(1), 41-62.
- Barnes, S.J., Mattsson, J., Sørensen, F., & Jensen, J.F. (2019). The mediating effect of experiential value on tourist outcomes from encounter-based experiences. *Journal of Travel Research*, 00(0), 1-14.
- Benur, A.M., & Bramwell, B. (2015). *Tourism Management*, 50(2015): 213-224.
- Chandralal, L., & Valenzuela, F. (2013). Exploring Memorable Tourism Experiences: Antecedents and Behavioural Outcomes. *Journal of Economics, Business and Management*, 1 (2): 177-181.
- Colliston, W.P., Cornell, D.H., Schoch, A.E., & Praekelt, H.E. (2015). Geochronological constraints on the Hartbees River Thrust and Augrabies Nappe: new insights into the assembly of the Mesoproterozoic Namaqua-Natal Province of Southern Africa. *Precambrian Research*, 265, 150-165.
- Cornelisse, M. (2014). Memorable Tourist Experiences in Authentic Vicos, Peru. *Journal of Tourism Consumption and Practice*, 6 (1), 104-127.
- Dowling, R., & Newsome, D. (Eds.) (2018). *Handbook of geotourism*. Edward Elgar Publishing, Massachusetts.
- Farsani, N.T., Coelho, C., & Costa, C. (2011). Geotourism and geoparks as novel strategies for socio-economic development in rural areas. *International Journal of Tourism Research*, 13(1), 68-81.
- Gordon, J. (2018). Geoheritage, geotourism and the cultural landscape: Enhancing the visitor experience and promoting geoconservation. *Geosciences*, 8(4), 136
- Grobbelaar, L., Bouwer, S., & Hermann, U.P. (2019). An exploratory investigation of visitor motivations to the Baberton-Makhonjwa Geotrail, South Africa. *GeoJournal of Tourism and Geosites*, 25 (2), 283-292.
- Ham, S. (2016). *Interpretation: Making a difference on purpose*. Fulcrum publishing.
- Hose, T.A. (2002). European 'geotourism' – geological interpretation and geoconservation promotion for tourists. In: D. Baretino, W.A.P. Wimbleton, E. Gallego (Eds) *Geological heritage: its conservation and management*, 127-146.
- Hose, T. A. (2012). 3G's for modern geotourism. *Geoheritage*, 4(1-2), 7-24.
- Hose, T. A. (2016). Three centuries (1670–1970) of appreciating physical landscapes. *Geological Society, London, Special Publications*, 417(1), 1-23.
- Hose, T. A., Marković, S. B., Komac, B., & Zorn, M. (2011). Geotourism—a short introduction. *Acta Geographica Slovenica*, 51(2), 339-342.
- Jacinto, F.O.C., & Du Preez, E.A. (2018). The role of small and medium enterprises in development of tourism in a post-war context: the case of Angola. *EuroEconomica*, 37(2), 143-157.
- Kang, M., Gretzel, U., & Jamal, T. (2008). Mindfulness: Definitions and Development of a Mindfulness Scale. In K. Aundereck (Ed.), 39th Annual Proceedings of the Travel and Tourism Research Association Conference, pp. 85-95. Boise
- Kim, J., Ritchie, J.R.B., & McCormick B. (2012). Development of a Scale to Measure Memorable Tourism Experiences. *Journal of Travel Research*, 51 (1): 12-25.
- Kim, J.-H. (2010). Determining the factors affecting the memorable nature of travel experiences. *Journal of Travel and Tourism Marketing*, 27(8): 780-796.
- Kim, J.-H. (2014). The antecedents of memorable tourism experiences: The development of a scale to measure the destination attributes associated with memorable experiences. *Tourism Management*, 44: 34-45.

- Knight, J., Grab, S., & Esterhuysen, A. B. (2015). Geoheritage and geotourism in South Africa. In *Landscapes and Landforms of South Africa* (pp. 165-173). Springer, Cham.
- Knobloch, U., Robertson, K., & Aitken, R. (2014). (Mis) Understanding the nature of tourist experiences. *Tourism Analysis*, 19(5), 599-608.
- Kruger, M., Viljoen, A., & Saayman, M. (2015). Why pay to view wildflowers in South Africa? *Tourism Analysis*, 20(1), 81-97.
- Lelliott, A. (2016). Visitors' views of human origins after visiting the Cradle of Humankind World Heritage Site. *South African Journal of Science*, 112(1-2), 01-08.
- Madi, K. (2016). Seismicity and neotectonic uplift in the Au-grabies Falls National Park, Namaqualand, Northern Cape, South Africa. *Earthquake Science*, 29(5), 281-289.
- Mathis, E. F., Kim, H. L., Uysal, M., Sirgy, J. M., & Prebensen, N. K. (2016). The effect of co-creation experience on outcome variable. *Annals of tourism research*, 57, 62-75.
- Mukwada, G., & Sekhele, N. (2017). The Potential of Community-based Geotourism in Rural Development in South Africa: The Case of Witsie Cave Project. *Journal of Asian and African Studies*, 52(4), 471-483.
- Ngwira, P.M. (2015). Geotourism and geoparks: Africa's current prospects for sustainable rural development and poverty alleviation. In *From Geoheritage to Geoparks* (pp. 25-33). Springer, Cham.
- Newsome, D., Dowling, R., & Leung, Y.F. (2012). The nature and management of geotourism: A case study of two established iconic geotourism destinations. *Tourism Management Perspectives*, 2, 19-27.
- Norman, N. (2013). *Geological Journeys: A traveller's guide to South Africa's rocks and landforms*, Penguin Random House, South Africa.
- Pallant, J. (2013). *SPSS survival manual*. McGraw-Hill Education, UK.
- Park, S., & Santos, C. A. (2017). Exploring the tourist experience: A sequential approach. *Journal of Travel Research*, 56(1), 16-27.
- Pearce, P.L., & Lee, U. (2005). Developing the travel career approach to tourist motivation. *Journal of Travel Research*, 43, 226-237.
- Pinchuck, T., McCrea, B., Reid, D., & Mthembu-Salter, G. (2002). *The rough guide to South Africa, Lesotho and Swaziland*. Rough Guides Ltd., London.
- Prebensen, N., Chen, J. S., & Uysal, M. (2014). Creating experience value in tourism. Boston: CAB International.
- Poria, Y., Butler, R., & Airey, D. (2004). Links between tourists, heritage, and reasons for visiting heritage sites. *Journal of Travel Research*, 43(1), 19-28.
- Robinson, M., & Novelli, M. (2005). Niche tourism: an introduction. *Niche tourism: Contemporary issues, trends and cases*, 1-11.
- Ruban, D.A. (2015). Geotourism - a geographical review of the literature. *Tourism Management Perspectives*, 15, 1-15.
- Ruban, D.A. (2017). Geodiversity as a precious national resource: A note on the role of geoparks. *Resources Policy*, 53, 103-108.
- Schlüter, T.L., & Schumann, A. (2018). Geosites as a potential for the development of tourism-overview of relevant sites in Eswatini (formerly Swaziland). *GeoJournal of Tourism & Geosites*, 22(2).
- Schutte, I.C. (2009). A strategic management plan for the sustainable development of geotourism in South Africa (Doctoral dissertation, North-West University).
- Serrano, E. & Trueba, J.J.G. (2011). Environmental education and landscape leisure. Geotourist map and geomorphosites in the Picos de Europa National Park. *GeoJournal of Tourism and Geosites*, 2(8), 295-308.
- Stratford, D.J. (2018). The Sterkfontein Caves after eighty years of paleoanthropological research: the journey continues. *American Anthropologist*, 120(1), 39-54.
- Stratford, D.J., Merlo, S., & Brown, S. (2016). The development of a new geospatial framework for the palaeoanthropological site of the Sterkfontein Caves, Cradle of Humankind, Gauteng, South Africa. *Journal of Field Archaeology*, 41(2), 211-221.
- Štrba, L. (2015). Identification and evaluation of geosites along existing tourist trail as a primary step of geotourism development: case study from the Spiš region (Slovakia). *GeoJournal of Tourism and Geosites*, 2(16), 127-141.
- Taber, K. (2017). The Use of Cronbach's Alpha When Developing and Reporting Research Instruments in Science Education. *Research in Science Education* <https://doi.org/10.1007/s11165-016-9602-2>
- Tung, W.S., & Ritchie, J.R.B. (2011). Exploring the essence of memorable tourism experiences. *Annals of Tourism Research*, 38 (4): 1367-1386.
- Uriely, N. (2005). The tourist experience: conceptual developments. *Annals of Tourism Research*, 32(1), 199- 216.

Submitted:
17.06.2019

Revised:
18.10.2019

Accepted and published online
21.10.2019

MILITARY BROWNFIELDS – POTENTIAL FOR TOURIST REVITALIZATION IN BOSNIA AND HERZEGOVINA

Snježana MUSA*

University of Mostar, Study of Geography, Faculty of Science and Education, Matice hrvatske bb, 88 000 Mostar, Bosnia and Herzegovina, e-mail: snjezamusa@gmail.com

Dario ŠAKIĆ

University of Mostar, Study of Geography, Faculty of Science and Education, Matice hrvatske bb, 88 000 Mostar, Bosnia and Herzegovina, e-mail: dario.a.sakic@gmail.com

Citation: Musa, S. & Šakić, D. (2019). MILITARY BROWNFIELDS – POTENTIAL FOR TOURIST REVITALIZATION IN BOSNIA AND HERZEGOVINA. *GeoJournal of Tourism and Geosites*, 26(3), 1021–1032. <https://doi.org/10.30892/gtg.26326-414>

Abstract: The existence and origin of "abandoned military facilities" has not exclusively related to geopolitical changes from the late 20th century. There are numerous abandoned military facilities in the world, ranging from conquering America to modern war shelter and warehouses. These objects were abandoned because of either changes in the doctrine of war, technology changes or the withdrawal of new frontiers. Their regeneration is primarily related to the interest of local authorities, such as the case with Albania, where abandoned bunkers are used for tourism development where they serve as accommodation facilities. Contemporary research of military brownfields tells the world that they are using as places for new tourist destinations, or for functional purposes such as administrative and residential buildings, warehouses, garages, etc. It is a fact that almost all urban areas in Bosnia and Herzegovina had barracks, so revitalization is carried out precisely from this point of view: one becomes a room for organizing university campuses or other public institutions. Other facilities especially those in rural areas are problematic, they are sources of pollution. The most obvious example is the object „Courage Barbara” in the Glamoč karst field, which is abundant with problems, such as those related to property legal relations and the wider dimensions of ecological disasters with far-reaching and hard-foreseeable consequences. There is a number of military bases as potential objects of tourist interest with exquisite landscape elements and enormous capacities.

Key words: Military brownfields, Bosnia and Herzegovina, functional transformation, touristic revitalization

* * * * *

INTRODUCTION

The brownfields concept has been popularized since the 1960s and has been linked to devastated and abandoned land in the process of de-industrialization and

* Corresponding author

internationalization. The expression began to spread to other areas of appearance, both in terms of traffic structure and abandoned farmland, but it is starting to be more forcefully used by the abandoned military areas and facilities. Works from the aforementioned field are not common, but we cite some of them: Syms, 1999; Litt & Burke, 2002; Dixon, 2006; Thornton et al., 2007; Wedding & Crawford-Brown, 2007 and others.

With respect to the concept of brownfields, there is still a lack of common understanding of the term itself. Urban designer, architects and economists, as well as geographers and ecologists are dealing with brownfields objects. As stated by Sýkorová (2007), brownfields research comes first, especially in the context of sustainable development, urban expansion and revitalization of city centers. Most authors approach to brownfields research through urban landscape issues (Novosák & Szcyrba, 2004), but it should be emphasized that these studies are related to urban areas. Brownfields also appear in villages, where is observed significant degradation of economic activity (Svobodová & Věžník, 2009). Often is in the literature discussed on their regeneration (Hercik et al., 2014) in the context of the construction of new or non-productive facilities and the design of Greenfields. The experiences of Eastern European countries show that their brownfields are primarily taken over by foreign investors, for which rapid return on capital is one of the key factors in their investment in mind of new business buildings (Botić, 2013) and premises (shopping centers, offices and flats). This is also the case in Bosnia and Herzegovina, where there are obvious examples in Zenica with a steel mill.

On the other hand, in developed market economies, regeneration is more often associated with brownfield sites and the application of public-private partnerships (Kalberer et al., 2005) and projects that have no purely commercial nature. Project for “Blue Hospital” in Bugojno is example for that kind of use of brownfields. However, that project has never come in realization. The purpose of that project is effectively design a redevelopment plan for the site of this former regional hospital, producing community space that promotes peace and reconciliation between the ethnic groups affected by conflict utilizing landscape processes and a program of socially based activities such as community gardening and food production (Figure 1) (Frank, 2015).



Figure 1. “Blue Hospital” in Bugojno today

In the brownfields regeneration process, it should be taken into account that they directly affect the possibilities of regeneration but also the factors that operate at a

higher state level (Dasgupta & Tam, 2009; Frantál et al., 2013). The range of factors affecting development and the potential of brownfield regeneration ranges from macro across the field to micro level, ie from institutional to economic and ecological impact on social and demographic conditions in space.

MILITARY BROWNFIELDS - MILITARY ABANDONED FACILITIES IN BOSNIA AND HERZEGOVINA

Some countries, for example USA, United Kingdom, France and West Germany, have long-term experience with the problems of brownfields, which had emerged already during the 1970s as a result of massively (Musa & Šiljković, 2011) declining mining, heavy industries and textiles. In comparison, in countries such as the Czech Republic, Slovakia, East Germany, Poland or Romania, brownfields appeared in large quantities just after the collapse of socialism with the centrally planned economy and return of a market economy and the following globalization trends during the last decade of the 20th century (Frantál et al., 2013). Subsequently, in the 1990s the military assets were reduced and certain transportation infrastructure was abandoned, thus these sites are added to brownfield sites. During and after this period the cycle of sites restructuring and their redevelopment was initiated (Kurtovic et al., 2014). As many countries in the Balkan region suffered from the consequences of deindustrialisation, Bosnia and Herzegovina (Picer et al., 2004) was affected by the sudden appearance of brownfield areas, especially in the course of the 20th century after progressive destruction induced by the 1992–1995 war (Gegic & Husukic, 2017). The geographic position and characteristics of the territory of Bosnia and Herzegovina contributed to the extremely high concentration of the military industry before the war during 1990s. Bosnia and Herzegovina is a typical mountain country with an average altitude of 750 m. Even 53.2% of the territory is located in the hypsometric area of 500 to 1500 meters. Numerous deep valleys, coves, canyons and rivers were ideal places for military shelters and warehouses, and mountain peaks over 2000 meters were excellent for basement pools, while high fields in karst used for military exercises, and today are polygons for destroying obsolete weapons and tools.

In the period from 1945 to 1992, Bosnia and Herzegovina was part of Social Federal Republic of Yugoslavia and as a centrally-laid republic played the role of a kind of military base, enough "hidden from potential enemies" and exceptionally advantageously geographically predestinated for the construction and preservation of numerous military bases, warehouses, shelters, polygons and other military facilities. Therefore, it happened that Bosnia and Herzegovina has a highly developed heavy and processing industry, but also optical industry in Konjic, Bugojno, Sarajevo, production of explosives was in facilities in Novi Travnik, etc. There are many atomic shelters, such as in Konjic, and big areas of quality agricultural land were captured in camps on Manjaca and Zmijanje, Kalinovik, Han Pijesak and Glamoc. In the 1960s, one of the largest artillery bases of the former Yugoslav People's Army was built on the slopes of the Manjaca Plateau.

This has led to the disappearance of many villages, the emigration of the population, the abandonment of traditional cattle breeding. Before the war in the area of Bijelo polje near Mostar there was a polygon for the destruction of the battle poisons. In the former Socialist Republic of Bosnia and Herzegovina, it is mainly invested in the military industry, especially in the construction of military bases. Bosnia and Herzegovina was the border between the western and eastern military districts. These facts also indicate that, in part, the territory of Bosnia and Herzegovina was pre-ordained for the war between 1992 and 1995. The war that occurred here had incredible resources in educated personnel, in finished military products and in facilities for their manufacture. Military facilities within urban environments (Simonović, 2013) have a multifaceted

character and can be easily transformed into residential, commercial and often educational, cultural or productive purposes. Part of the rural areas are intended for recreation, mixing of some production or storage capacities and so on.

Due to the many problems and their consequences, stemming from the use and maintenance of military brownfields this problem has been initiated for resolving in some countries but not in Bosnia and Herzegovina. On the contrary, there are persistent irredeemable problems in Bosnia and Herzegovina with abandoned military technology, terrain and even modern pollution caused by military action.

RESULTS AND DISCUSSIONS

Functional transformation of military brownfields in Bosnia and Herzegovina - the current state of affairs

After the war, numerous areas as "military brownfields" remained, which are not cleaned today, and they are source of many drawbacks. Their development continues through the activation of the space for the destruction of weapons, such as Resolute Barbara Range (Figure 2), in the Glamoc field. This range was first used by SFOR (The Stabilisation Force) in 1996 under the General Framework Agreement for Peace.



Figure 2. Destruction of weapons on Resolute Barbara Range (Photo: Hanka Džin Jahjaefendić, 2017)

This form of resource management has been introduced by the international community to stop the division of military facilities and what goes on with them, so there is no privatization. On the one hand, it may be good, but the other is bad because the time passes, and some objects, which are national monuments such as the beautiful architectural building with excellent position of Jajce Barracks in Sarajevo are collapsing. The second problem is that some items remain due to weathering; third is in some cases illegal privatization through recapitalization, etc. As we can see, military industry is still an important economic factor with a 112 465 000 BAM gained of export during first 8 months of 2018 (Agency for statistics of B&H). Although there is not much left of this industry, there is enough basis for future development. When we speak of brownfield sites, it is important to emphasize the importance of investment in the process of their rehabilitation and reuse. Reduction of investment in brownfield sites occurred mainly in developed countries. The main reason for this, in addition to financial and credit constraints, is a high risk for this type of investment, and weak prospects for economic

growth in the world (Kurtovic et al., 2014). The Armed Forces B&H had an agreement with Sterling International, which is responsible for the implementation of the destruction of armaments and weapons in the Glamoc karst field, which is underground watershed between the Adriatic and Black Sea river basins. Although there are numerous problems related to unresolved legal cadastral relations and those related to environmental pollution, not only locally but regionally, the range is still in operation. The Federal Institute of Agropedology has conducted several analyzes on the Resolute Barbara Range where NATO and then the Armed Forces of B&H destroyed armed surpluses. The data showed the presence of heavy metals in quantities greater than allowed, which could lead to serious illnesses. Local residents sued the State for compensation for damage done on private soil.

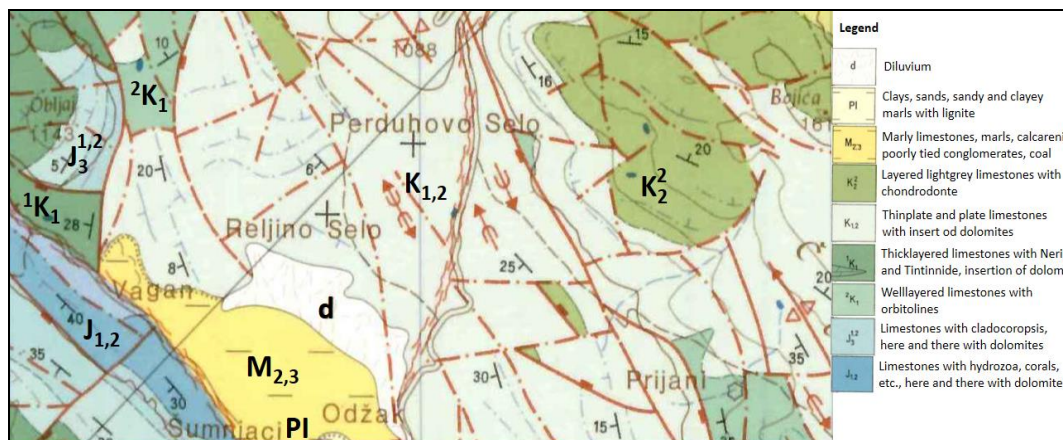


Figure 3. Resolute Barbara Range on the karst area below which is the underground watershed of the Adriatic and Black Sea river basin. On the geological map, you can see cracked karst, numerous faults and other karst forms, which indicate the potential contamination routes of both river basins. (Source: Geological map 1:100000, L33-142, Belgrade, 1978)

The number of abandoned military facilities is extremely large, and the problems that result from them are numerous. They are classified into several groups:

1. Mine fields as environmental pollution;
2. Resolute Barbara Range on the karst area below which is the underground watershed of the Adriatic and Black Sea river basin (see a geological map, Figure 3)
3. Abandoned facilities of military-technological parks such as Vitezit in municipality Novi Travnik;
4. Abandoned relays;
5. Abandoned military aerodromes

Military bases as potential tourist destination

There are numerous examples of transformation of military brownfields to public and business premises in Bosnia and Herzegovina, such as military facilities in center of major towns Sarajevo, Banja Luka, Mostar, Travnik – they are transformed in education (University campuses) and cultural facilities (libraries). Atomic shelter in Konjic (Figure 4) is today a museum titled "Titov bunker". There is a plan for the development of hotel accommodation in the same area. Numerous mountain centers, relays and so on have been turned into relay centers of television stations or telephones and mobile operator. Many of them are still in ruins and representing danger for humans because of their proximity to tourist sites. Based on this short analysis, some acute problems and localities can be distinguished:

- Environment and Health: the biggest problem is the Resolute Barbara Range, which is the area of the destruction of weapons from the previous war.
- An example of large pollution is the detonation of deadly uranium bombs from the last war in Hadzici, Bjelasnica, Kalinovik and Han Pijesak, etc.
- Unfulfilled privatization causes decay of historical monuments such as Jajce Barracks in Sarajevo
- The current legal framework in B&H does not allow the privatization of military facilities, thus preventing the revitalization of military brownfields throughout B&H.
- Although there is a military database on military property, it is assumed that there is no database of military brownfields that would provide information on the number of the same and link them to risks to human health and environmental burdens.



Figure 4. The Atomic shelter in Konjic is a museum-national monument of B&H and a tourist destination

The status of military bases in the territory of B&H is different. Of course, those in larger urban areas are under the struggles between interests. In B&H, these facilities are divided into perspective and non-perspectives military property. Perspective should be registered as property of B&H. These are some of the strategic military bases.

Problem is different interests of Federation of B&H and Republic of Srpska (RS) on these topics (Bijelić & Filipović, 2016). The problem is that RS is seeking to adopt a comprehensive law that would cover all the assets of the former JNA (Yugoslav People's Army) and then postulate under that law. The Federation of B&H first agreed to it, and then changed their minds and abandoned the law. Most of the unspoken military assets eventually are provided to local communities.

Military brownfields – revitalization of potential tourist destinations

Military brownfields have long been used as tourist destinations in the countries of Western Europe: the Netherlands, Norway, Denmark, Sweden, which made accommodation facilities from many of military facilities for example. During the period of transformation after 1989 we can note many processes in the post-communist countries which have considerably changed their politics on the one hand and their societies and economies on the other. These processes involve de-industrialisation, de-agrarianisation and demilitarisation as a part of geopolitical changes (Matlović et al., 2001). According to Baskaya (2010) brownfields sites include several values, such as economic, historical, social, environmental, psychological, technological, spatial and ecological value (Figure 5).

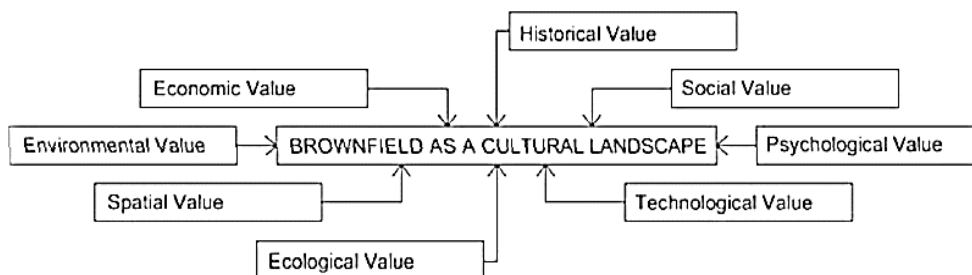


Figure 5. Value of brownfield sites (Source: Baskaya, 2010)

Only in the territory of Bosnia and Herzegovina, for almost fifty years, 17 facilities were designed for temporary placement and shelter of those "main" in state service (12 in Federation and 5 in RS). Most of them are built so that they can easily be revitalized and used for tourist purposes, either as accommodation, transport or recreational facilities. Although it is difficult to get information about them, the fact is that in the Spatial plan of Federation of B&H there is a list of all military facilities that are categorized in perspective and non-perspective, and then by structure. Such data for RS could not be found.

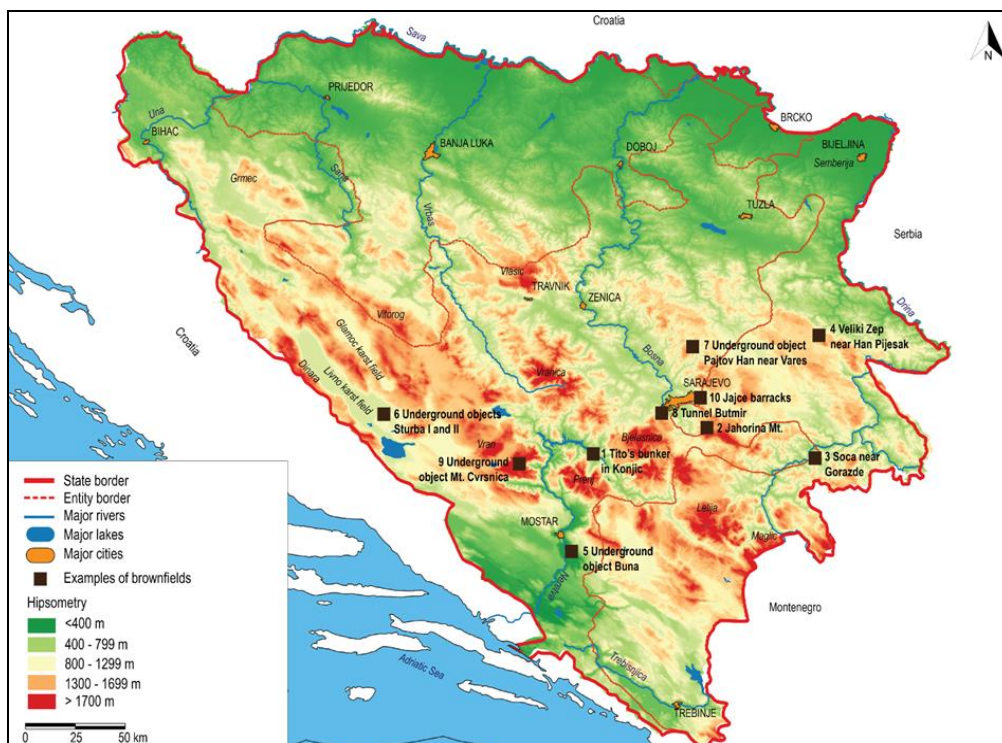


Figure 6. Geographical position of several brownfields in Bosnia and Herzegovina

Facilities intended for temporary placement and sheltering the state service: underground city in Konjic (Tito's bunker), Jajce barracks in Sarajevo, facilities in Jahorina Mt., underground city Soc near Gorazde, Veliki Zep near Han Pijesak, underground facility in Buna, facilities in Livno municipality (Sturba 1 and 2), Ljepunica near Pazaric, Pajtov han near Vares, war tunnel in Butmir, Vitorog Mt., Cvrstica Mt.,

Bjelasnica Mt. Military brownfields can also be a valuable asset for the development of tourism in Bosnia and Herzegovina, as a cultural resource whose inclusion in the tourist offer would increase its attractiveness and enrich it with unusual activities (Figure 6).

1. Tito's bunker in Konjic

Atomic war command, also known as the Ark and nicknamed Tito's bunker, is a former nuclear bunker and military command center located near the town of Konjic in Bosnia and Herzegovina. Built to protect Yugoslav President Josip Broz Tito and up to 350 members of his inner circle in the event of an atomic conflict, the structure is made up of residential areas, conference rooms, offices, strategic planning rooms, and other areas. The bunker remained a state secret until after the breakup of Yugoslavia in the 1990s. Built between 1953 and 1979 inside a hill at the foot of the Zlatar Mountain, the ARK is the largest nuclear shelter, and one of the largest underground facilities, ever built in the former Yugoslavia. For over a decade after its completion, it was the most secret military installation in the country. All construction workers were carefully selected and vetted, signing a contract of silence, and all staff members held the highest security clearance. In 1979, when work was completed after 26 years and \$4.6 billion in construction costs (<https://www.bunker.ba>, 8th March 2019).

2. Jahorina Mt.

On every higher mountain in B&H there are underground facilities, and the larger one is on the top of the Jahorina Mt. near Sarajevo, under the hotel for military pilots that the Americans bombed in 1995. The overground part was demolished, but the underground was not seriously damaged (Figure 7).

3. Underground object "Soca" near Gorazde

His area is 15000 sq meters. Amongst other things, there were 98 numbered offices and rooms. There are also two larger meeting rooms, an ambulance area and a large restaurant. Most of facilities are destroyed, and some of them are used for mushroom production (Figure 8).

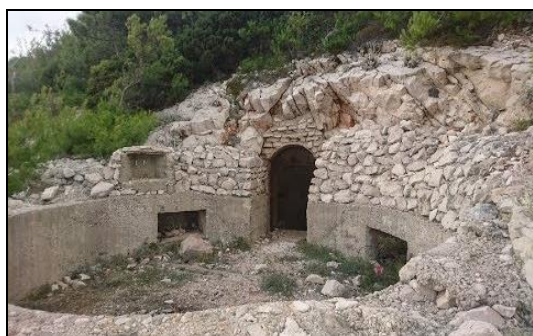


Figure 7. Underground facilities on the top of the Jahorina Mt



Figure 8. Underground object "Soca" near Gorazde (Photo: Zeljko Delic, 2015)

4. Veliki Zep near Han Pijesak

That is an underground bunker, built as the main command center in the event of a new war. The bunker is seven miles away from Han Pijesak and today it is devastated and closed (Figure 9).

5. Underground object Buna

It is located on the road Mostar-Blagaj, directly next to the Mostar Airport, connected to the access routes used for the departure of the aircraft to the main runway. The completely underground facility consists of two tunnels intended for hiding helicopters and airplanes. It was built in the period from 1969 to 1971 (Figure 10). During the war in Mostar and its surroundings, this facility was destroyed.

6. Underground objects Sturba 1 and 2 near Livno

They are now used as a warehouse for military artillery. During the last war in B&H it had function of military hospital (Figure 11).



Figure 9. Underground bunker Veliki zep, Han Pijesak
(Google maps (visited on 27/8/2019) and Zeljko Delic, 2009)



Figure 10. Entrance and access to underground structures Buna, near Mostar

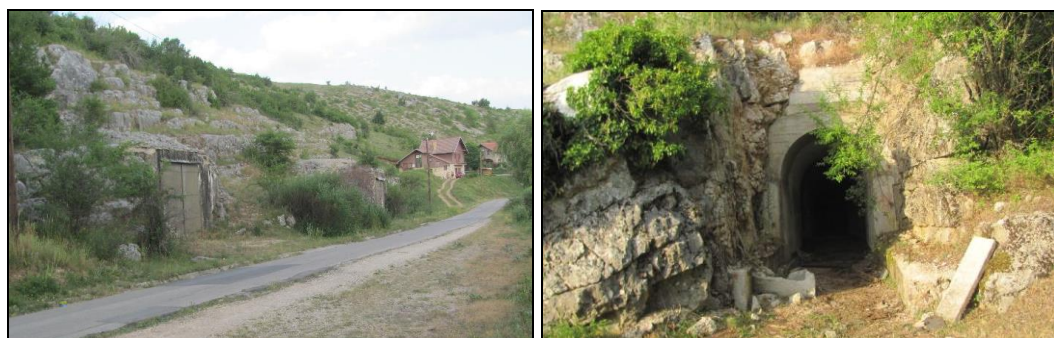


Figure 11. Underground objects Sturba 1 and 2, near Livno

7. Underground object Pajtov han near, Vares

Pajtov han represents a military object in two levels, a maze, about 500 meters long. Its capacity is 130,000 cubic meters, making it one of the largest terminal for strategic reserves in the areas of former Yugoslavia. It should have been a storage space for petroleum products. There are dozens of business backyard facilities, deep in the woods. During the time it is being destroyed (Figure 12).



Figure 12. Underground object Pajtov han near Vareš (Photo: Roman Petrovic, 2016)



Figure 13. Entrance to the war tunnel in Sarajevo's Butmir settlement

8. Tunnel Butmir near Sarajevo

It is underground tunnel, which was used as communication between Sarajevo and Igman Mt. during the last war in B&H. Tourists visit it and it is in every tourist offer in Sarajevo (Figure 13).

9. Underground object on Mt. Cvrsnica

There is a military facility built before the war as a relay hub, a surveillance and eavesdropping object. Prior to the war, besides the military bases, there was a hydro-meteorological station that had an extraordinary role in recording climatic data, as the location of this site is shifting continental and maritime influences. Today, this is an active military facility, and we think it would be far more cost-effective and more interesting to be offered to tourists, as the view goes to Adriatic Sea (Figure 14).

10. Barracks "Jajce" in Sarajevo

In today's form completed in 1914. By construction it is the most complex military object in B&H from the Austro-Hungarian period, whose construction and development are closely related to the history of Sarajevo. It is declared a national monument of B&H, but 80% of the complex is devastated. Numerous armies were held in the barracks, from the Austro-Hungarian, Yugoslav People's Army, to the Army of the Republic of B&H and the Armed Forces of B&H. It is located in the east of the city, within the old town Vratnik, on the plateau of the southern part of the remains of the medieval old town. It has an ideal position the hotel complex of high category in place of the ideal viewing point (Figure 15).

According to Badiali et al. (2018) this could be an important instrument and basis for future actions on urban landscape, not only for tourist development and information of citizens, but also for territorial planning.



Figure 14. From the military facility on Mount Čvrtnica you can see the whole of Herzegovina



Figure 15. Example of the „Jajce“ Barracks in Sarajevo: Exceptional architectural structure, the national monument of BiH, in a ruined state - extraordinary predisposition to high-class hotel

CONCLUSION

"Military brownfield" in B&H are very numerous. Property relations and entity interests do not lead to solving problems related to them. They are somewhere in the function of public institutions as universities, sometimes they serve for museum purposes, but are often our disgrace and the source of environmental problems, such as Resolute Barbara Range and destroyed raley on Bjelasnica Mt. Positive examples are rare, one of them is Tito's bunker in Konjic, which is at least somehow attracted to tourist exploitation. In B&H, there are still at least 10 potential tourist destinations that link to military brownfields, and among the most interesting are: Jajce barracks in Sarajevo, facilities on Jahorina Mt., Underground city of Soč, Underground facilities Veliki Zep, underground facilities near Buna, Sturba 1 and 2 near Livno, Ljepunica near Pazarić, Pajtov han near Vareš, Butmir, Vitorog Mt., Čvrtnica Mt., Bjelašnica Mt. It is a public secret that the land of numerous barracks in BiH has long been the focus of building lobbies, who see the opportunity to bargain cheaply in cities with ready-made infrastructure. Although this problem in B&H has support at different levels, there seems to be a stronger current in which local spatial development is influenced primarily by politics, and it makes a decision on sales consistent with politics. Changes cannot be

expected even in the future as experience shows that potential investors are scared of ecological risks associated with military brownfields regeneration and therefore seek greenfields for investment and thus convert agricultural to construction sites.

REFERENCES

- Badiali, F., Ilieș, D.C., & Castaldini, D. (2018). A tale of a city, through its urban landscape and cultural heritage in the heart of Europe: the case study of Oradea city (Romania), *GeoJournal of Tourism and Geosites*, Year XI, no. 1, vol. 21, May 2018, p.88-102.
- Baskaya, T. (2010). Ways to sustainable brownfield regeneration in Istanbul, Istanbul Technical University, Faculty of Architecture, Istanbul, Vol. 7, No. 2, 76–77.
- Bijelić, B., & Filipović D. (2016). Identification and ecological aspects of large-scale brownfields in the Republic of Srpska, *Spatium* No. 36, December 2016, pp. 1-6.
- Botić, Jurica (2013). Spatial and national distribution of foreign direct investments in Bosnia and Herzegovina, *Hrvatski geografski glasnik* 75/1, 131-150.
- Dasgupta S., & Tam E. (2009). Environmental review: A comprehensive review of existing classification systems of brownfield sites. *Environmental Practice*, 11(4): 285–300.
- Dixon T. (2006). Integrating sustainability into brownfield regeneration: Rhetoric or reality? – An analysis of the UK development industry. *Journal of Property Research*, 23(3): 237–267.
- Frank, James W. (2015): Ruins in the landscape: the Blue Hospital of Bugojno, University of Manitoba.
- Frantál, B., Kunc, J., Nováková, E., Klusáček, P., Martinát, S., & Osman, R. (2013). Location matters! Exploring brownfields regeneration in a spatial context (a case study of the South Moravian region, Czech Republic), *Moravian Geographical Reports*, Vol. 21, No. 2, p. 5-19.
- Gegić, A. & Husukić, E. (2017). Evaluation of the Brownfield regeneration process: Case study of Sarajevo, Bosnia and Herzegovina. *Journal of Urban Regeneration and Renewal*: 276–285. Volume 10 / Number 3 /Spring 2017, pp. 276-285(10), *Publisher Henry Stewart Publications*.
- Hercik, J., Šimáček, P., Szczyrba, Z., & Smolová, I. (2014). Military brownfields in the Czech Republic and the potential for their revitalisation, focused on their residential function, *Quaestiones geographicae* 33(2), pp. 127-138.
- Kalberer A., Klever S.F., & Lepke T. (eds) (2005). The future lies on brownfields. Federal Environmental Agency.
- Kurtović, S., Siljković, B., & Pavlović, N. (2014). Methods of identification and evaluation of brownfields sites, *International journal of research in business and social science*, Vol.3, No. 2, 105–120.
- Litt J. S., & Burke T. A. (2002). Uncovering the historic environmental hazards of urban brownfields. *Journal of Urban Health* 79(4): 464–481.
- Matlović R., Ira V., Sýkora L., & Szczyrba Z. (2001). Procesy transformacyjne struktury przestrzennej miast postkomunistycznych (na przykładzie Pragi, Bratysławy, Olomuńca oraz Preszowa) (Transformation of the spatial structure of post-communist towns: the case of Prague, Bratislava, Olomouc and Presov). In: Jażdżewska I. (ed.), *Miasto postsocjalistyczne – organizacja przestrzeni miejskiej I jej przemiany* (II). XIV Konwersatorium Wiedzy o Mieście, Uniwersytet Łódzki, Łódź: 243–251.
- Musa, S., & Šiljković, Ž. (2011). Geographic characteristics of landmine fields in Croatia and Bosnia and Herzegovina, *IGU Chile, Santiago de Chile*, 14- 18. XI. 2011., acreditacion.fisa.cl/201108201956_20111174mydroa_archivo_prese.
- Novosák J., & Szczyrba Z. (2004). Frýdek-Místek: konverze tradičních průmyslových ploch, širší vztahy geografické struktury. *Urbanismus a územní rozvoj* 7(2): 36–45.
- Picer, N., Miošić, N., Hodak-Kobasić, V., Kovač, T., Čalić, V., & Hrvatović, H. (2004). War waste and pollution of karstic area of Bosnia and Herzegovina with PCBS. *Organohalogen compounds*, Vol. 66, 1313-1320.
- Simonović D. (2013). Hidden values and disputed collectivism of brownfields in the city of Banjaluka, Conference Proceedings, International Conference and Exhibition on architecture, Strand, Belgrade. 2013.
- Svobodová H., & Věžník A. (2009). To the problems of agricultural brownfields in the Czech Republic, case study of the Vysočina region. *Agricultural Economics* 55(11): 550– 556.
- Sýkorová I. (2007). Pražské brownfields: příležitost i hrozba pro rozvoj metropole. *Geografie–Sborník České geografické společnosti* 112(3): 250–265.
- Syms P. (1999). Redeveloping brownfield land. The decision-making process. *Journal of Property Investment & Finance* 17(5): 481–500.
- Thornton G., Franz M., Edwards D., Pahlen G., & Nathanail P. (2007). The challenge of sustainability: incentives for brownfield regeneration in Europe. *Environmental Science & Policy*, 10(2): 116–134.
- Wedding G. Ch., Crawford-Brown D. (2007). Measuring site-level success in brownfield redevelopments: A focus on sustainability and green building. *Journal of Environmental Management*, 85(2): 483–495.
- *** Economic statistics – first release. BiH foreign trade in goods statistics Jan – Aug 2018, Agency for statistics of Bosnia and Herzegovina.

STONE IN AN URBAN SPACE – ITS POTENTIAL TO PROMOTE GEOTOURISM

Maria GÓRSKA-ZABIELSKA*

Jan Kochanowski University, Institute of Geography, Chair of Geotourism and Environmental
Geology, Świętokrzyska St 15, 25-401 Kielce, Poland, e-mail: maria.gorska-zabielska@ujk.edu.pl

Ryszard ZABIELSKI

Polish Geological Institute National Research Institute,
Rakowiecka St 4, 00-975 Warszawa, Poland, e-mail: ryszard.zabielski@pgi.gov.pl

Citation: Górską-Zabielska M. & Zabielski R. (2019). STONE IN AN URBAN SPACE – ITS
POTENTIAL TO PROMOTE GEOTOURISM. *GeoJournal of Tourism and Geosites*, 26(3), 1033–
1045. <https://doi.org/10.30892/gtg.26327-415>

Abstract: The geological heritage of Pruszków, although with an easy access, remains
beyond the knowledge and consciousness of its inhabitants. Besides the short
description of the area's geodiversity, the article presents ten large erratic boulders
and other stone elements occurring in the town. It is indicated that they have high
scientific, educational, cultural-historical, and – not less important – aesthetic values.
The promotion of these values can stimulate the development of urban geotourism.
Geoconservation activities can contribute to the creating the image of the town, in
which the principles of sustainable development are taken into account.

Key words: geological heritage, geodiversity, georesources, erratic boulders, stone
objects, geotourism, Pruszków, Mazovia region

* * * * *

INTRODUCTION

Stone elements in towns and the role they play have already been described many
times, considering various aspects. These peculiar georesources are valuable examples of
geological heritage (=geosites) occurring in towns (Rubinowski & Wójcik, 1978; Migoń,
2012; Dowling, 2013; Del Monte et al., 2013; Lollino et al., 2015; Pica et al., 2015;
Zagożdżon & Zagożdżon, 2016; Chylińska & Kołodziejczyk, 2018; Brocx & Semeniuk,
2019; Pereira & Van den Eynde, 2019; da Silva, 2019). Palacio-Prieto (2015) defines
urban geosites as the places representing geological or geomorphological values, formed
as a result of geological processes or created by man but closely connected with geology.

According to him these can be, among others, buildings for the construction of
which rocks were used. Rocks may also be geosites (Migoń, 2012), including erratic
boulders (Reynard, 2008) incorporated into an architectonically developed urban space
(e.g. Duraj et al., 2017; Keiter, 2017; Grimmberger, 2017; Köppe et al., 2018; Górską-

* Corresponding author

Zabielska & Zabielski, 2018). If they link geological aspect with mysterious myths, which is an example of cultural value of an erratic bolder, they attract mankind's attention in every epoch (Motta & Motta, 2007). The various use of stone in urban space in Poland has been recently described by Zagożdżon & Śpiewak (2011) and Zagożdżon & Zagożdżon (2015). The latter authors pointed out two main aspects connected with this fact, i.e. geotourist and petroarchitectural aspect. The present paper falls into the geotourist trend because its purpose is to document the stone resources in Pruszków in order to expand the tourist offer in the Warsaw agglomeration. Not less important aim of the paper is to indicate new chances of sustainable development of the district and town and to create the image of the town, which should adapt some elements of abiotic nature for tourist purposes, in accordance with the principles of environmental protection.

Georesources are the objects of interest in geotourism (among others Hose, 1995; Słomka & Kicińska-Świdorska, 2004; Newsome & Dowling, 2006, 2010; Migoń, 2012), including urban geotourism (among others Rodrigues et al., 2011; Del Monte et al., 2013; Del Lama et al., 2015; Lollino et al., 2015; Pica et al., 2015, 2016; Chylińska & Kołodziejczyk, 2018). Geotourism is a new branch of tourism, which appeared a few years ago, and combines sightseeing with qualified tourism. Geotourism is also a branch of cognitive tourism based on the exploration of geological objects and processes, which provides aesthetic experiences. Geotourism is also an economic activity. It offers geoproducts (e.g. Reynard et al., 2015; Farsani et al., 2011, 2017; Yuliawati et al., 2019), which are the solution for the local community empowerment bringing them real financial benefits (Xun & Ting 2003; Dowling, 2013).

GEODIVERSITY OF THE STUDY AREA

Pruszków is a district town in south-western Mazovia, which has had the town charter for 100 years. In 2018 the number of its inhabitants was approximately 60,000. The geological past, recorded in landforms and deposits, resulted in the great geodiversity (Gray, 2004; Zwoliński, 2004; Brilha, 2016) of this area. This geodiversity manifests itself mainly in the relief of the Łowicz-Błonie Plain, which is built of ground moraine, composed of till left by the Scandinavian ice-sheet during the recessional Wartanian Stage of the Odranian Glaciations (=MIS [marine isotope stage] 6; cf. Lindner & Marks, 2012; Marks et al., 2018, 2019) (Figure 1). The brown soils, which developed on till, are used in agriculture, also within the limits of Pruszków, in the historical Production Complex of Horticulture, which was established by Piotr Ferdynand Hoser around 1898 (Municipal Records of Monuments). The vast open areas of the Łowicz-Błonie Plain, used as meadows and arable fields, are a forefield for palace and park complexes (e.g. in Pruszków, Helenówek, Pęcice) exposing their architectural and composition values (Lewin & Korzeń, 2008). The glacitectonically squeezed Pliocene clays (Kowalczyk & Nowicki, 2007) were exploited in a brickyard at the turn of the 19th and 20th centuries, and consequently housing construction developed (Kaleta, 2010).

This stage of town development left the so-called „quarter of millionaires” (inhabited by the prosperous inhabitants of Pruszków, among others by the members of the "Association of Polish Mechanics from America" returning from the United States, as well as by the workers of the Rail Rolling Stock Repair Workshops and the "St. Majewski and Co." Pencil Factory; Krzyczkowski, 2009; Kaleta, 2010), several street names (e.g. Ceramic Street or Brick Street), and also the so-called „count's clay pit ponds” (belonging to Antoni Potulicki, the last owner of Pruszków; Bielawski, 2009).

Bog iron ore (e.g. Kholodov et al., 2012; Fomenko & Sokolov, 2019) was another raw material exploited near Pruszków and Brwinów (Ruszkowski, 2019). In the period from 2nd century BC to 4th century AD the resources of this natural raw material

became the basis for the development of a large centre of production and processing of iron (Woyda, 2002, 2006; Tomczak, 2007). The objects from this period, discovered during archaeological excavations, are exhibited in the recently renovated Museum of Ancient Mazovian Metallurgy (<http://msh.m.pl/wp/>).

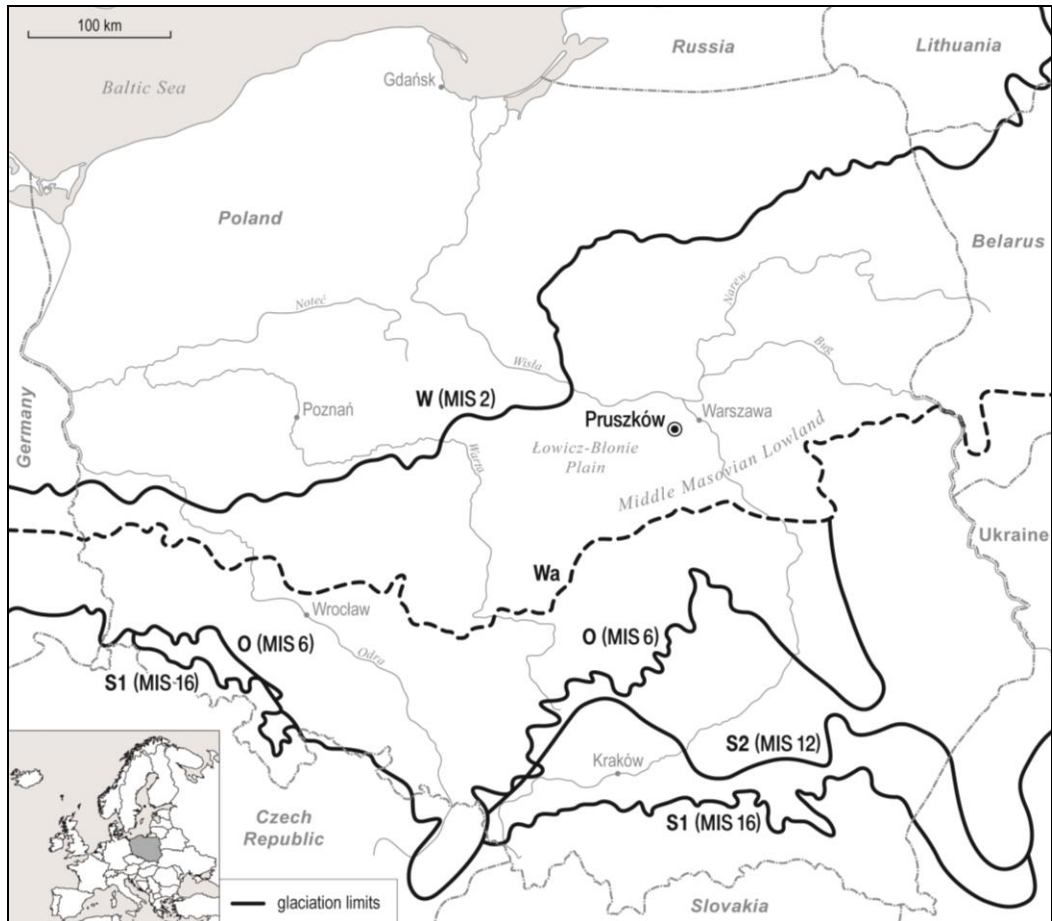


Figure 1. Location of Pruszków in relation to the extents of the Scandinavian ice-sheets according to Marks et al. (2018, 2019). S1 (MIS 16) – Saanian 1, S2 (MIS 12) – Saanian 2, O (MIS 6) – Odranian, Wa – Wartanian, W (MIS 2) – Weichselian

Water is a natural resource that should be protected but unfortunately the inhabitants of the Mazovia region rarely care about it. In the Łowicz-Blonie Plain water occurs mainly in numerous rivers and streams. The described area is drained by the Utrata River and its tributaries (Żbikówka, Regulka, Raszynka, Zimna Woda). The inhabitants of Pruszków appreciate only the recreational value of water (bathing, fishing, walking along the banks). They gladly visit the vicinity of the storage reservoir on the Utrata River in the nearby village of Komorów, the large exploitation pit (now filled with water) of the former brickyard of the Hoser brothers in the northern part of Pruszków, and the fishponds (former "count's clay pit ponds") in the Potulicki Park in the town centre (Skwara, 2002; Lewin & Korzeń, 2008; Jakubowski, 2009). All these objects were created due to favourable natural relief and the adaptation of the Utrata River oxbows and

old exploitation pits of the brickyard (Bielawski, 2009). The inhabitants of Pruszków use also the groundwater resources that are exploited for their needs (Kowalczyk & Nowicki, 2007). Three water intakes exploit the Oligocene aquifer (groundwater is drawn from a depth of 238-244 m below ground surface), and one intake draws water from the Quaternary aquifer from a depth of 29.5 m below ground surface.

METHODS

The course of the research in the field covered an inventory of stony elements within the urban area. This procedure consists of measuring the basic dimensions of the boulders (Table 1). In turn, each boulder was considered for its Scandinavian provenance. Attention was paid to whether there is indicator erratic.

Table 1. List of the ten largest erratic boulders in Pruszków

Petrographic type, provenance, age	Length [m]	Width [m]	Height [m]	Diameter [m]	Volume [m³]	Weight [m]	Location in the town
1. Småland granite SE Sweden; 1.75-1.5 bn years	3.1	2.3	1.3	8.0	4.64	12.8	Museum of the Ancient Mazovian Metallurgy 52°09'52"N 20°48'32"E
2. Scandinavian sandstone, probably of Cambrian age; 541-485 m. years	2.65	0.55	1.85	5.85	1.4	3.9	John Paul II' Square 52°09'52"N 20°48'30"E
3. Rapakivi granite from the Åland Islands; 1.7-1.54 bn years	1.25	0.7	0.8	3.4	0.37	1.01	John Paul II' Square 52°09'54"N 20°48'28"E
4. Gneiss from the Baltic Shield; 1.96-1.75 bn years	1.0	0.65	1.1	3.15	0.37	1.03	Centre of the town 52°10'06"N 20°48'25"E
5. Quartzitic porphyry from the Åland Islands; 1.7-1.54 bn years	1.4	1.1	0.9	3.8	0.72	1.99	In front of the Museum DULAG 121 52°10'23"N 20°48'27"E
6. Småland granite, SE Sweden; 1.75-1.5 bn years	1.2	0.8	1.08	3.45	0.54	1.49	Bersohn' Square 52°10'06"N 20°48'02"E
7. Gaize from the bedrock of the Botnian Gulf or from the Lower Vistula Valley; 145-66 m. years	2.05	1.7	1.15	6.0	2.1	4.19	In front of the Social Insurance Institution building 52°09'51"N 20°47'38"E
8. Granite-gneiss from the Baltic Shield; 1.96-1.75 bn years	1.85	1.95	0.95	6.0	1.79	4.93	In front of the Sport School Complex 52°09'39"N 20°47'04"E
9. Småland granite, SE Sweden; 1.75-1.5 bn years	2.15	1.3	1.0	5.6	1.46	4.0	Southern part of the town 52°09'14"N 20°47'37"E
10. Karlshamn granite from Blekinge	2.6	1.7	1.3	6.45	3.0	8.26	Lipowa Street 52°09'21"N 20°48'39"E

Explanation: boulder volume was calculated using the formula: $0.523 \times \text{length} \times \text{width} \times \text{height}$ (Schulz, 1964; Speetzen, 1998); boulder weight was calculated on the assumption that $1\text{m}^3 = 2.75$ tons

For this purpose, available atlases of such rocks as eg. Meyer (1983), Zandstra (1999), Smed & Ehlers (2002) and Rudolph (2012, 2017) have been used. The provenance of some erratic boulders have been indicated by the boulder size (Table 1), which is mainly an effect of bedrock joint in source area (eg., Gorbatshev, 1980; Gaál & Gorbatshev 1987; Johansson, 1988; Rodhe, 1992; Berglund et al., 1992; Lindh, 2002; Scholz & Obst 2004). Also other specific features have been taken into consideration, like e.g. presence of crystals of blue quartz in Småland granites (Bartholomäus & Solcher, 2002) or large round potassium feldspars surrounded by a border of soda-calcium feldspars in Åland granites (Meyer, 1983). The next stage of research has been a recognition of the role of erratic boulders in the city. The following values have been considered: cognitive, scientific, educational, culture-forming, aesthetic and geoconservation. All of them cocreate the geotourist value of stony objects within the city limits.

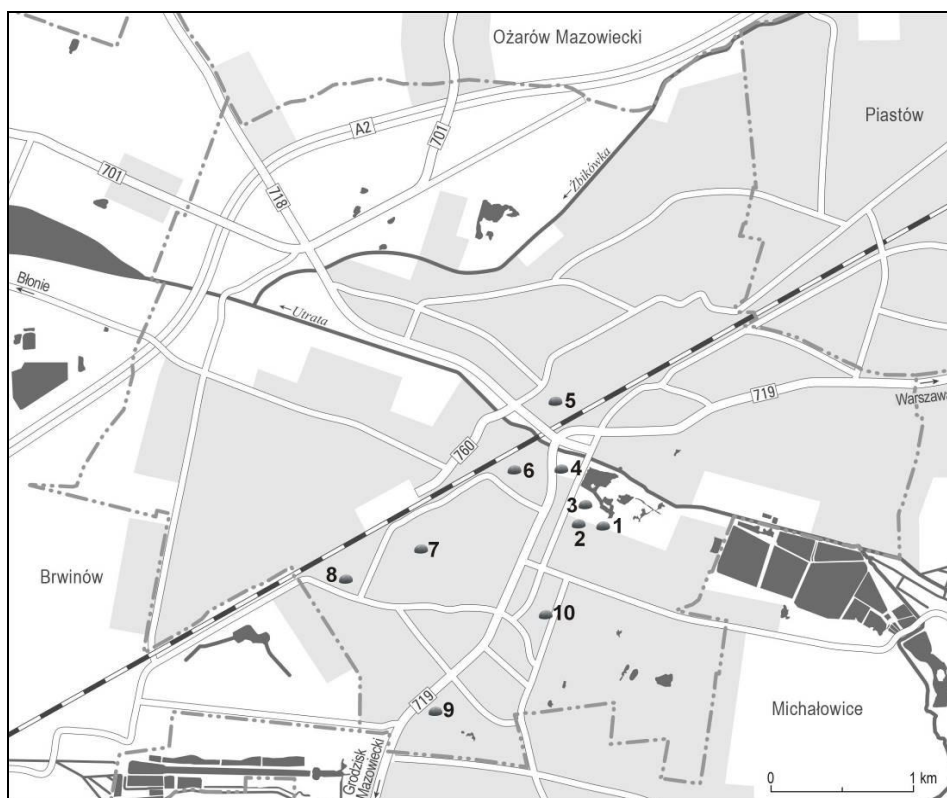


Figure 2. Location of ten largest erratic boulders in Pruszków (compare Table 1)

STONY OBJECTS IN PRUSZKÓW

Stone in Pruszków is present in natural and cultural heritage objects.

The first group includes erratic boulders, which were deposited in the Mazovia region during the recessional Wartanian Stage of the Odranian Glaciations (=MIS 6; cf. Lindner & Marks, 2012; Marks et al., 2018, 2019). The authors of the paper know ten large erratic boulders occurring within the limits of Pruszków (Figure 2). These boulders are characterized in the Table 1. All erratic boulders in Pruszków, although they occur *ex situ*, i.e. not in the places of their original glacial deposition, belong to the local geological heritage of this part of the Mazovia region, which is their **cognitive** and even **scientific**

value. Closer observation of a boulder allows identifying its mineral composition and petrographic type, and thus the geological processes that affected it from the time of crystallization during diastrophic processes ended with orogenesis, which formed the bedrock of the present-day Scandinavia, through the transport in an ice-sheet, to the glacial deposition in the European lowlands. Based on the origin of a boulder from a particular outcrop in Scandinavia, it can be described as an indicator erratic (Korn, 1927; Lüttig, 1958; Meyer & Lüttig, 2007). The analyses of statistically representative indicator erratics allow to indicate with high probability their source areas and to determine the directions of long-distance transport to the places where the erratics were left by an ice-sheet. These features create the **educational value** of an erratic boulder. This value is increased by some morphological features of boulder surface (formed during glacial transport) such as roundness, glacial polish and striae, crescent chatter marks (Figure 3a, b, No. 8 in Figure 2 and in Table 1) as well as the traces of abrasion in the form of microribs (Figure 4, No. 6 in Figure 2 and in Table 1). The latter are a record of morphogenetic processes that have continually modified the surface of a boulder since the time when it was left in dry and cold periglacial environment in the foreland of a retreating ice-sheet.

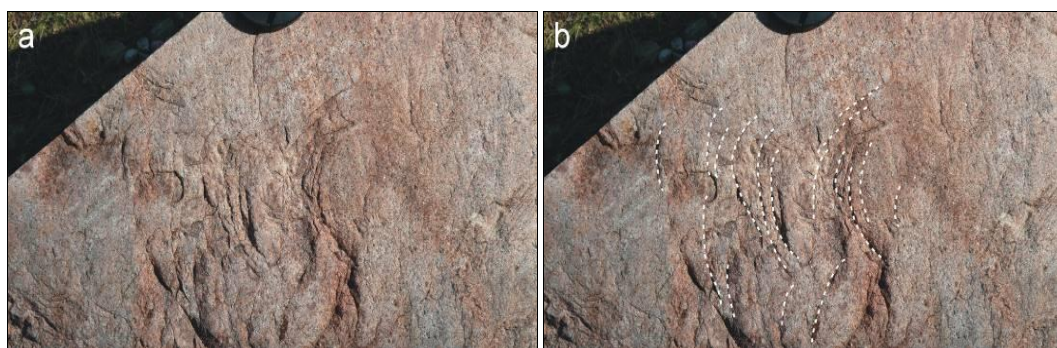


Figure 3a. Fragment of an erratic boulder – gneiss; **3b.** Visible crescent chatter marks formed by the scratching of the rock surface by the sharp edges of the crumbs carried in the ice-sheet sole. Occurring in front of the Sport School Complex, the boulder may play an educational role

The aesthetic value of boulders is created by their size and attractive appearance. For this reason some of the boulders were set in good locations in the town or in private gardens. The boulders, objects commonly found as indestructible, resistant to the passage of time (in the scale of human life), are used as monuments or pedestals of monuments, with commemorative plaques fixed to them (Figure 5, No. 5 in Figure 2 and in Table 1; also Nos. 3, 6, 10 in Figure 2 and in Table 1). In such situations the erratic boulders play both the **culture-forming** and **aesthetic** role. The largest erratic boulder in Pruszków (No. 1 in Figure 2 and in Table 1), due to its size, is protected by law as a monument of inanimate nature (the only one of this kind in the Pruszków district). As the object of protection it has **geoconservation value**. Unfortunately, none of the erratic boulders in Pruszków has its own name or legend. Therefore, these boulders have no historical value and their cultural significance is small. The erratic boulders in the urban space of Pruszków are also present in the Falcon Park (Figure 6), on the lawns along the streets (e.g. ventifacts with visible abrasion microrelief, Figure 7), and also – sliced up – as the windowsills of shops (Figure 8a, b). It is worth mentioning that the number of erratic boulders in Pruszków is constantly increasing because more and more new buildings are built and their foundations reach deep into the glacial deposits so new erratic boulders are dug up. Several of the cultural heritage objects in Pruszków are connected with geology.



Figure 4. Fragment of an erratic boulder – granite (No. 6 in Table 1). Visible parallel microribs, which are the result of abrasion – destructive aeolian process affecting the boulder in dry and cold periglacial environment in the foreland of the shrinking ice-sheet



Figure 5. Commemorative plaque on an erratic boulder in front of the Museum DULAG 121. The rock plays here the culture-forming and aesthetic role



Figure 6. Three abraded erratic boulders in the Falcon Park, centre of Pruszków, play aesthetic role



Figure 7. A model example of ventifact might have played an educational role in the town

Stones, though not necessarily Scandinavian erratics, are also present in gabions (Italian *Gabbione* – cage), i.e. steel cages filled with the coarse-gravel fraction. They have, besides aesthetic and decorative, also a practical function, e.g. they stabilize slopes, for example in the Żwirowisko Park (former gravel pit, Figure 9). Gabions are also the original fences of private properties (Figure 10). Stone objects are commonly found in the Pruszków cemeteries and in the historic Jewish cemetery (Figure 11). Most of the matzhevas in the Jewish cemetery were made of the so-called Kunów sandstone (Lower Jurassic), exploited in the vicinity of Kunów near Ostrowiec Świętokrzyski (eastern part of the Świętokrzyskie Province). This sandstone has been commonly used as the material for architectural details and sculptures. That is why it is found in many cemeteries in the Mazovia region.



Figures 8a & 8b. The windowsills of a toy shop were made of rapakivi granite, the outcrops of which occur on the Åland Islands



Figure 9. Gabions in the Żwirowisko Park stabilize the slopes of the former gravel pit and have aesthetic and decorative function



Figure 10. Gabions are the original fences of private properties in Pruszków



Figure 11. Stone is present in the town, among others, in the historic Jewish cemetery

The outer walls of the building of District Authority Office are covered with the Novabrik elevation brick. It is made of the mixture of natural aggregates: granite, marble and mica (Figure 12). Plasticizers, binders and colorants were added to the mixture to improve the visual and technical characteristics of brick.



Figure 12. The outer walls of the building of District Authority Office are covered with the elevation brick made of the mixture of natural aggregates: granite, marble and mica

DISCUSSION

The stony objects of Pruszków are not present in the awareness of inhabitants. The initial survey conducted among the inhabitants of Pruszków does not arouse optimism. Though stone material has been present in the town for a long time and within reach, few people notice it, let alone exploit its educational or cognitive values. In some cases the aesthetic values of boulders were taken into account so they were set in good locations in order to commemorate an important person or event. Consequently, such boulders play a historical-cultural role. And in all, erratic boulders have potential to promote urban geotourism. Based on them, an educational or even geotourist path could be marked out taking into account the assumptions of the strategy of hands-on activities (Brzezińska-

Wójcik, 2015), which consist in the active and emotional commitment of tourists or pupils, and thus making their education more effective. Therefore, the educational values of erratic boulders should be noticed by the Pruszków teachers who complain about difficult contact with geological exhibits (the closest collection of rocks is in the Geological Museum of the Polish Geological Institute in Warsaw).

Geotourists who will see new attractive objects on the map of Pruszków, will decide to come to the town to get to know their history. It is therefore necessary for the municipal authorities to have (even temporarily) a specialized geo-storyteller (Wolniewicz 2019) or a guide who will impart the necessary knowledge in a professional way. It depends on his/her qualifications whether the persons interested (geotourists) notice the value of the object that affects the overall assessment of the geodiversity of the region. The transfer of knowledge should be accompanied by a leaflet or folder, and preferably a chapter in the monograph/tourist guide to Pruszków or Warsaw surroundings. Publications should be printed in a local printing house and available in the Pruszków bookshops, kiosks, coffee houses, and similar institutions. It is worth adding that the authors of this paper tried to disseminate knowledge among the inhabitants of Pruszków publishing every month a geological column in a local journal and organizing educational walks through the town. Not less interesting are innovative field games, like geocaching (<https://www.geocaching.com/play> access on 11.06.2019) or Tourist and Recreation Orienteering Games (<http://trino.pttk.pl/> in Polish access on 11.06.2019).

Tourists, staying in the town, will make use of the gastronomic offer and will be interested in buying souvenirs. It is in the interest of the municipal authorities to meet the needs of tourists by the development of the appropriate paratourist infrastructure.

The inhabitants will profit from the development of (geo) tourism because it will result in the job creation. Expanding the urban tourist offer is urgent because – according to the results of the research commissioned by the Pruszków Municipal Council (Pruszków Stop, 2007) – as much as 75% of the surveyed inhabitants (from the group of 450 people aged 25-60) do not see the tourist values of their town.

CONCLUSION

The authors hope that the implementation of the above-mentioned ideas will increase the Pruszków inhabitants' knowledge of the geological past of the town's immediate surroundings, of the recent history of the town experiencing a building boom or, finally, of the plans of Pruszków development founded on urban geotourism.

Properly exposed objects of inanimate nature will sustain and strengthen the ties of inhabitants with their town through the environment, culture, aesthetics, and heritage (cf. National Geographic, 2005; Reynard, 2008). Their role in the sustainable development of the district and town cannot be overestimated. They contribute to creating the image of the town, in which the elements of abiotic nature are adapted for tourist purposes, in accordance with the principles of environmental protection.

Finally, it should be noted that local initiatives, increasing awareness among the inhabitants, and the promotion of all the geotourist values will certainly help to draw attention to the need for stronger protection of the inanimate resources of the Earth.

Acknowledgment

This contribution presents some results from research project No. 612502 (statutory investigations at the Jan Kochanowski University in Kielce). The authors acknowledge to anonymous reviewer for their thoughtful suggestions and comments. The authors thank M. Wilgat for English translation, M. Gościńska-Kolanko for drawing Figs 1 and 2, and share the participation in the study as follows: MGZ 70%, RZ 30%. M. Górską-Zabielska have taken all photographs.

REFERENCES

- Bartholomäus, W. A. & Solcher, J. (2002). The less known properties of blue quartz. *Geschiebekunde Aktuell*, no. 18, vol. 3, p. 99-106.
- Berglund, J., Larson, S. Å. & Stigh, J. (1992). Features of the Protogine Zone, south central Sweden. *Geologiska Föreningens i Stockholm Förhandlingar*, no. 114, p. 337-339.
- Bielawski, P. (2009). Pruszków. Plan Miasta [Pruszków. City plan]. Urząd Miasta w Pruszkowie.
- Brilha, J. (2016). Inventory and Quantitative Assessment of Geosites and Geodiversity Sites: a Review. *Geoheritage*, no. 8, vol. 2, p. 119-134. <https://doi.org/10.1007/s12371-014-0139-3> [access 12.06.2019].
- Brocx, M. & Semeniuk, V. (2019). Building Stones Can Be of Geoheritage Significance. *Geoheritage* 11: 133-149. <https://doi.org/10.1007/s12371-017-0274-8>.
- Brzezińska-Wójcik, T. (2015). Strategia hands-on activity w kreowaniu geoproduktów w kontekście edukacji, interpretacji i promocji geodziejstwa na Roztoczu (Środkowozachodnia Polska) [Hands-on activity strategy in creating geoproducts in the context of education, interpretation and promotion of geoheritage in Roztocze (Central-Western Poland)]. *Zeszyty Naukowe Uniwersytetu Szczecińskiego* 847. *Ekonomiczne Problemy Turystyki*, no. 1, vol. 29, p. 169-193.
- Chylińska, D. & Kołodziejczyk, K. (2018). Geotourism in an urban space? *Open Geoscience*, no. 10, p. 297-310.
- da Silva, C., M. (2019). Urban Geodiversity and Decorative Arts: the Curious Case of the “Rudist Tiles” of Lisbon (Portugal). *Geoheritage*, no. 11, p. 151-163 <https://doi.org/10.1007/s12371-017-0253-0>
- Del Lama, E., A., De La Corte Bacci, D., Martins, L., Da Gloria Motta Garcia, M. & Kazumi Dehira, L. (2015). Urban Geotourism and the Old Centre of São Paulo City, Brazil. *Geoheritage*, no. 7, vol. 2, p. 147-164.
- Del Monte, M., Fredi, P., Pica, A. & Vergari, F. (2013). Geosites within Rome City center (Italy): a mixture of cultural and geomorphological heritage. *Geografia Fisica e Dinamica Quaternaria*, no. 36, p. 241-257.
- Dowling, R., K. (2013). Global Geotourism – An Emerging Form of Sustainable Tourism. *Czech Journal of Tourism*, no. 2, vol. 2, p. 59-79.
- Dryglas, D. & Miśkiewicz, K. (2016). Construction on the geotourism product structure on the example from Poland. 14th International Multidisciplinary Scientific Geoconference SGEM, Geoconference on Ecology, Economics, Education and Legislation, 17-26.06.2014, Albena, Bulgaria. *Conference Proceedings*, vol. II, p. 155-162.
- Duraj, M., Niemiec, D., Cheng, X. & Kolenák, P. (2017). Vestiges of glacial action in Ostrava: their significance for an application in geotourism. World Multidisciplinary Earth Sciences Symposium (WMES), *IOP Conf. Series: Earth and Environmental Science*, no. 95; doi: 10.1088/1755-1315/95/5/052014
- Farsani, N. T., Coelho, C., Costa, C. & Neto de Carvalho, C. (2011). Geoparks and Geotourism. New Approaches to Sustainability for the 21st Century. *BrownWalker Press*.
- Farsani, N. T., Mortazavi, M., Bahrani, A., Kalantary, R. & Bizhaem, F. K. (2017). Traditional crafts: A tool for geo-education in geotourism. *Geoheritage*, no. 9, vol. 4, p. 577-584. DOI 10.1007/s12371-016-0211-2
- Fomenko, A.I. & Sokolov, L.I. (2019). Study of Sorption Properties of Bog Ores for Extraction of Manganese and Iron Ions from Ground Water. *Russian Journal of Applied Chemistry*, no. 92, vol. 2, p. 288-294.
- Gaál, G. & Gorbatshev, R. (1987). An outline of the Precambrian evolution of the Baltic Shield. *Precambrian Research*, no. 35, p. 15-52.
- Gminna Ewidencja Zabytków [Municipal Records of Monuments], Urząd Miasta Pruszkowa, <http://www.pruszkow.pl/urząd/planowanie-przestrzenne/gminna-ewidencja-zabytkow> [access 8.05.2017].
- Gorbatshev, R. (1980). The Precambrian development of southern Sweden. *Geologiska Föreningens i Stockholm Förhandlingar*, no. 102, p. 129-136.
- Górska, M. (2006). Fennoscandian erratics in glacial deposits of the Polish Lowland – methodical aspects. *Studia Quaternaria*, no. 23, p. 11-15.
- Górska-Zabielska, M. & Zabielski, R. (2018). Geotourism Development in an Urban Area based on the Local Geological Heritage (Pruszków, Central Mazovia, Poland). In M.J. Thornbush & D.A. Casey (Eds.), *Urban Geomorphology. Landforms and Processes in Cities*. Elsevier, Chapter 3, p. 37-54.
- Gray, M. (2004). Geodiversity: Valuing and Conserving Abiotic Nature. John Wiley & Sons Ltd ISBN 978-0470848951.
- Grimmberger, G. (2017). Der Davids-Stein bei Utzedel – ein „neues altes“ Geotop [The David Stone at Utzedel - a "new old" geotope]. *Geschiebekunde Aktuell*, no. 33, vol. 3, p. 101-103.
- Hose, T.A. (1995). Selling the story of Britain's stone. *Environmental Interpretation*, no. 10, vol. 2, p. 16-17. https://www.researchgate.net/publication/279529623_Geo-produkty_w_geoparkach_i_geoturystyce_Geo-products_in_geoparks_and_geotourism.
- Jakubowski, T. H. (2009). Lata prawie bezgrzeszne [Years almost sinless]. Powiatowa i Miejska Biblioteka Publiczna im. H. Sienkiewicza w Pruszkowie, Pruszków.
- Johansson, Å. (1988). The age and geotectonic setting of the Småland-Värmland granite-porphyry belt. *Geologiska Föreningens i Stockholm Förhandlingar*, no. 110, p. 105-110.
- Kaleta, J. (2010). Pruszków przemysłowy [Industrial Pruszków]. Wydawnictwo Powiatowa i Miejska Biblioteka Publiczna im. H. Sienkiewicza w Pruszkowie, Pruszków.

- Keiter, M. (2017). Die „Grossen Sieben“ und der neue Findlingsgarten in Bielefeld – Botschafter vom saalezeitlichen Eisrand [The „Big Seven“ and the new Erratic Boulders Garden in Bielefeld – Messengers from the Saalian Ice Margin]. *Geschiebekunde aktuell*, no. 33, vo. 4, p. 119-129.
- Kholodov, V.N., Nedumov, R.I. & Golubovskaya, E.V. (2012). Facies Types of Sedimentary Iron Ore Deposits and Their Geochemical Features: Communication 1. Facies Groups of Sedimentary Ores, Their Lithology, and Genesis. *Lithology and Mineral Resources*, no. 47, vol. 6, p. 447-472.
- Köppe, E.-F., Zutz, H.-D. & Keiter, M. (2018). Herkunft und Geschichte von drei Findlingen auf dem Bielefelder Stadtgebiet [Origin and history of three boulders on the Bielefeld municipal area]. *Geschiebekunde aktuell*, no. 34, vol. 2, p. 65-67.
- Korn, J., (1927). Die wichtigste Leitgeschiebe der nordischen kristallinen Gesteine im norddeutschen Flachlande. Preußische geologische Landesanstalt Berlin, pp. 64 (in German).
- Kowalczyk, A. & Nowicki, Z. (2007). Warszawa [Warsaw]. In Z. Nowicki (ed.), *Wody podziemne miast wojewódzkich Polski. Informator Państwowej Służby Hydrogeologicznej*, Warszawa, p. 221-242.
- Krzyczkowski, H. (2009). Dzielnica milionerów [Millionaire's district]. Wydawnictwo Powiatowa i Miejska Biblioteka Publiczna im. H. Sienkiewicza w Pruszkowie, Pruszków.
- Lewin, M. & Korzeń, J. (2008). Park Kulturowy Gminy Michałowice jako narzędzie ochrony walorów i środowiska kulturowego gminy Michałowice [Cultural Park of the Michałowice Commune as a tool to protect the values and cultural environment of the Michałowice commune]. Wydawnictwo Gmina Michałowice.
- Lindh, A. (2002). The southern part of the Transscandinavian Igneous Belt. *Beiheft zum European Journal of Mineralogy*, no. 14, vol. 1, p. 185-217.
- Lindner, L. & Marks, L. (2012). O podziale klimatostratygraficznym kompleksu środkowopolskiego w plejstocenie Polski [Climatostratigraphic subdivision of the Pleistocene Middle Polish Complex in Poland]. *Przegląd Geologiczny*, no. 60, vol. 1, p. 1-10.
- Lollino, G., Giordan, D., Marunteanu, C., Christaras, B., Yoshinori, I. & Margottini, C. (2015). Engineering Geology for Society and Territory, Vol. 8 *Preservation of Cultural Heritage*. Springer.
- Lüttig, G. (1958). Methodische Fragen der Geschiebeforschung. *Geologisches Jahrbuch*, no. 75, p. 361-418.
- Marks, L., Bińska, K., Woronko, B., Majecka, A. & Teodorski, A. (2019). Revision of the late Middle Pleistocene stratigraphy and palaeoclimate in Poland. *Quaternary International*, [https://doi: 10.1016/j.quaint.2019.02.023](https://doi.org/10.1016/j.quaint.2019.02.023).
- Marks, L., Karabanov, A., Nitychoruk, J., Bahdasarau, M., Krzywicki, T., Majecka, A., Pochocka-Szwarc, K., Rychel, J., Woronko, B., Zbucki, Ł., Hradunova, A., Hrychanik, M., Mamchyk, S., Rylova, T., Nowacki, Ł. & Pielach, M. (2018). Revised limit of the Saalian ice sheet in central Europe. *Quaternary International*, no. 478, p. 59-74.
- McDonnell, M. J. & MacGregor-Fors, I. (2016). The ecological future of cities. *Science Magazine*, no. 352, vol. 6288, p. 936-938.
- Meyer, K.-D. (1983). Indicator pebble and stone count methods. In J. Ehlers (Ed.), *Glacial deposits in North-West Europe*. Balkema, Rotterdam, p. 275-287.
- Meyer, K.-D. & Lüttig, G., (2007). What do we mean by indicator erratic? *Geschiebekunde aktuell*, no. 23, vol. 4, p. 106-121 (in German).
- Migoń, P. (2012). Geoturystyka [Geotourism]. Wydawnictwo Naukowe PWN, Warszawa.
- Miśkiewicz, K. (2015). Geoprodukty w Geoparkach i Geoturystyce [Geoproduks in geoparks and geotourism]. *I Ogólnopolskie Forum pt.: „GEO-PRODUKT: od geologii do produktu turystycznego”*. Kielce, 24-24.09.2015. In www.researchgate.net [online], [access 10.04.2017]
- Motta, L. & Motta, M. (2007). Erratic blocks: from protector beings to geosites to be protected. *Geological Society, London, Special Publications*, no. 273, vol. 1, p. 315-327. doi:10.1144/GSL.SP.2007.273.01.24
- Newsome, D. & Dowling, R. (2006). The scope and nature of geotourism. In D. Newsome & R. Dowling (Ed.), *Geotourism. Sustainability, impacts and management*. Oxford, UK, Elsevier/ Heineman Publishers, p. 3-25.
- Newsome, D. & Dowling, R. (2010). Geotourism: The Tourism of Geology and Landscape. Oxford: Goodfellow Publisher.
- Palacio-Prieto, J.L. (2015). Geoheritage within Cities: urban geosites in Mexico City. *Geoheritage*, no. 7, vol. 4, p. 365-373.
- Pereira, D. & Van den Eynde, V.C. (2019). Heritage Stones and Geoheritage. *Geoheritage*, no. 11, p. 1-2. <https://doi.org/10.1007/s12371-019-00350-9>.
- Pica, A., Grangier, L., Reynard, E., Kaiser, Ch. & Del Monte, M. (2016). GeoguideRome, urban geotourism offer powered by mobile application technology. In *Abstracts EGU General Assembly 2016*, 17-22 April 2016, Vienna Austria, p. 941.
- Pica, A., Vergari, F., Fredi, P. & Del Monte, M. (2015). The Aeterna Urbs Geomorphological Heritage (Rome, Italy). *Geoheritage*, no. 8, vol. 1, p. 1-12.
- Reynard, E. (2008). Scientific research and tourist promotion of geomorphological heritage. *Geografia Fisica e Dinamica Quaternaria*, no. 31, p. 225-230.
- Reynard, E., Kaiser, Ch., Martin, S. & Regolini, G. (2015). An Application for Geosciences Communication by Smartphones and Tablets. In G. Lollino et al. (Ed.), *Engineering Geology for Society and Territory Vol. 8 Preservation of Cultural Heritage*. Springer, p. 265-272.
- Rodhe, A. (1992). Terminology and ideas regarding the Protogine Zone in southern Sweden. *Geologiska Föreningens i Stockholm Förhandlingar*, no. 114, p. 360-365.

- Rodrigues, M.L., Machado, C.R. & Freire, E. (2011). Geotourism routes in urban areas: a preliminary approach to the Lisbon geoheritage survey. *GeoJournal of Tourism and Geosites*, no. 8, vol. 2, p. 281-294.
- Rubinowski, Z. & Wójcik, Z. (1978). Odsłonięcia geologiczne Kielc i okolic oraz problemy ich ochrony i zagospodarowania [Geological outcrops of Kielce and the surrounding area, as well as problems of their protection and development]. *Prace Muzeum Ziemi*, no. 20, p. 95-121.
- Rudolph, F. (2012). Beach stones. Collecting & determining stones on the Baltic coast, 11th edn. Wachholtz, Neumünster.
- Rudolph, F. (2017). The big book of beach stones. The 300 most common stones on the coast of North and Baltic Sea. Wachholtz Murmann Publishers, Neumünster.
- Ruszkowski, M. (2019). Rudy darniowe na ziemi Łowickiej. [Iron ore deposits in the Łowicz Region]. *Nowy Kamieniarz*, no. 2, vol. 108, p. 76-82.
- Scholz, H. & Obst, K. (2004). Einführung in die Geologie Skandiniavens. *Geographische Rundschau*, no. 56, vol. 2, p. 43-49.
- Schulz, W., (1964). Die Findlinge Mecklenburgs als Naturdenkmäler. *Archiv für Naturschutz*, no. 4, vol. 3, p. 99-126.
- Skwara, M. (2002). Pruszków. Nasze miasto. [Pruszków. Our town]. Powiatowa i Miejska Biblioteka Publiczna im. H. Sienkiewicza w Pruszkowie, Pruszków.
- Smed, P. & Ehlers, J. (2002). Steine aus dem Norden. Geschiebe als Zeugen der Eiszeit in Norddeutschland. Gebrüder Borntraeger. Berlin, Stuttgart.
- Słomka, T. & Kicińska-Świdorska, A. (2004). Geoturystyka – podstawowe pojęcia [Geotourism – basic vocabulary]. *Geoturystyka*, no. 1, vol. 1, p. 5-7.
- Speetzen, E., (1998). Findlinge in Nordrhein-Westfalen und angrenzenden Gebieten. Geologisches Landesamt Nordrhein-Westfalen, Krefeld.
- Tomczak, E. (2007). Starożytne centrum metalurgiczne koło Warszawy. Zagadnienia dyskusyjne. [Ancient metallurgical center near Warsaw. Discussion issues]. *Archeologia Polski*, no. 52, vol. 1-2, p. 177-186.
- Wolniewicz, P., (2019). Bringing the History of the Earth to the Public by Using Storytelling and Fossils from Decorative Stones of the City of Poznań, Poland. *Geoheritage*. <https://doi.org/10.1007/s12371-019-00400-2> Accessed 25.08.2019 [access 25.08.2019].
- Woyda, S. (2002). Mazowieckie centrum metalurgiczne z młodszego okresu przedrzymskiego i okresu wpływów rzymskich [Mazovian metallurgical center from the younger pre-Roman period and the period of Roman influence]. In S. Orzechowski (Ed.), *Hutnictwo świętokrzyskie oraz inne centra i ośrodki starożytnej metalurgii żelaza na ziemiach polskich* [Świętokrzyskie metallurgy and other centers of ancient iron metallurgy in the Polish lands]. Wydawnictwo Świętokrzyskie Stowarzyszenie Dziedzictwa Przemysłowego, Kielce, p. 151-154.
- Woyda, S. (2006). Mazowieckie Centrum Metalurgiczne z czasów Imperium Rzymskiego [Mazovian Metallurgical Center from the time of the Roman Empire]. In I. Horban, Z. Chmura & G. Zegadło (Eds.), *Przegląd Pruszkowski*, nos. 1-2, p. 5-9.
- Xun, Z. & Tin, Z., (2003). The socio-economic benefits of establishing national geoparks in China. *Episodes*, no. 26, vol. 4, p. 302-309.
- Yuliawati, A.K., Rofaida, R., Gautama, B.P. & Hadian, M.S.D. (2019). Geoproduct Development as Part of Geotourism at Geopark Belitong. Conference Proceedings, 1st International Conference on Economics, Business, Entrepreneurship, and Finance (ICEBEF 2018) <https://doi.org/10.2991/icebef-18.2019.27> [access 15.07.2019].
- Zagożdżon, P. & Śpiewak, A. (2011). Kamień w architekturze a geoturystyka miejska – przykłady z terenu Wrocławia [Stone in architecture and urban geotourism - examples from the area of Wrocław]. *Prace Naukowe Instytutu Górnictwa Politechniki Wrocławskiej* 133, *Studia i Materiały*, no. 40, p. 123-143.
- Zagożdżon, P. & Zagożdżon, K. (2015). Kamienne elementy architektury miejskiej jako geologiczne zaplecze edukacyjne – przykłady wrocławskie [Stony elements of urban architecture as a geological educational background - Wrocław examples]. *Przegląd Geologiczny*, no. 63, vol. 3, p. 150-154.
- Zagożdżon, P. & Zagożdżon, K. (2016). Wybrane aspekty geoturystyki w Polsce – obiekty podziemne i geoturystyka miejska [Selected aspects of geotourism in Poland - underground facilities and urban geotourism]. *Przegląd Geologiczny*, no. 64, vol. 9, p. 739-750.
- Zandstra, J. G. (1999). Platenatlas van noordelijke kristallijne gidsgesteenten. Backhuys Publishers, Leiden.
- Zwoliński, Zb. (2004). Geodiversity. In A. Goudie (Ed.), *Encyclopedia of Geomorphology*. London: Routledge, p. 417-418.
- *** National Geographic (2005). Geotourism Charter http://www.nationalgeographic.com/travel/sustainable/pdf/geotourism_charter_template.pdf [access 12.11.2015].
- *** Pruszków Stop (2007). A study commissioned by the Commune Pruszków by PBS DGA Company o.o. <<http://www.pruszkow.pl/poznaj-miasto/przystanek-pruszkow>> [access 10.11.2015].
- <http://mshm.pl/wp/>.
- <https://www.geocaching.com/play> access on 11.06.2019.
- <http://trino.pttk.pl/> in Polish access on 11.06.2019.

Submitted:
17.07.2019

Revised:
29.10.2019

Accepted and published online
31.10.2019

LANDSCAPES OF THE TENIZ-KORGALZHYN DEPRESSION IN THE REPUBLIC OF KAZAKHSTAN: EVALUATION OF ECOSYSTEM FUNCTIONS AND OPPORTUNITIES FOR TOURISM

Yerzhan N. SAGATBAYEV*

L. N. Gumilyev Eurasian National University, Department of Physical and Economical
Geography, 2 Mirzoyanst, 010008, Nur-Sultan Kazakhstan, e-mail: sagatbaev@mail.ru

Sergey V. PASHKOV

M. Kozybayev North Kazakhstan State University, Department of Geography and Ecology,
Pushkin St. 86, 150000, Petropavlovsk, Republic of Kazakhstan, e-mail: sergp2001@mail.ru

Alexander N. DUNETS

Altai State University, Department of Economic Geography and Cartography,
Pr. Lenina 61a, 656049 Barnaul, Russia, e-mail: dunets@mail.ru

Ordinbek B. MAZBAYEV

L. N. Gumilyev Eurasian National University, Department of Physical and Economical
Geography, 2 Mirzoyanst, 010008, Nur-Sultan Kazakhstan, e-mail: ordenbek@mail.ru

Citation: Sagatbayev, Y.N., Pashkov, S.V., Dunets, A.N. & Mazbayev, O.B. (2019).
LANDSCAPES OF THE TENIZ-KORGALZHYN DEPRESSION: EVALUATION OF ECOSYSTEM
FUNCTIONS AND OPPORTUNITIES FOR TOURISM. *GeoJournal of Tourism and Geosites*,
26(3), 1046–1056. <https://doi.org/10.30892/gtg.26328-416>

Abstract: Based on the concept of total environmental value, it is estimated the total
economic value of the geosystem functions of the wetlands of specially protected
natural territories of the Teniz-Korgalzhyn depression. A comprehensive cost
accounting of the indirect functions of the landscape has been carried out:
environment -regulating, environment-forming, ethical, aesthetic and others - which
are usually not taken into account in the economy, in contrast to the market-based
approach to assessing natural resources. The development of tourism in the region is
considered, especially of the ecotourism, which have a good perspectives.

Key words: landscapes, protected natural areas, wetlands, geosystem functions,
ecotourism, Teniz-Korgalzhyn depression.

* * * * *

INTRODUCTION

One of the problems of rational use of renewable natural resources is associated
with the insufficient development of an economic assessment of the indirect ecosystem

* Corresponding author

functions of landscapes, which leads to their "non-competitiveness" in comparison with traditional (resource) ways of economic development. This largely explains the relevance of the selected research topic. Evaluation of the ecosystem functions of landscapes is a multicomponent task, due to their complex structural and functional organization. To determine the significance of landscapes, an assessment of three main functions is necessary: resource-providing, environment-regulating and aesthetic.

Teniz-Korgalzhyn depression is located in the Akmola and Karaganda regions of central Kazakhstan, South-West from the capital city Nur-Sultan. Total area of the depression is 32662 km², from which arr. 2600 km² are lakes and wetlands (Figure 1).

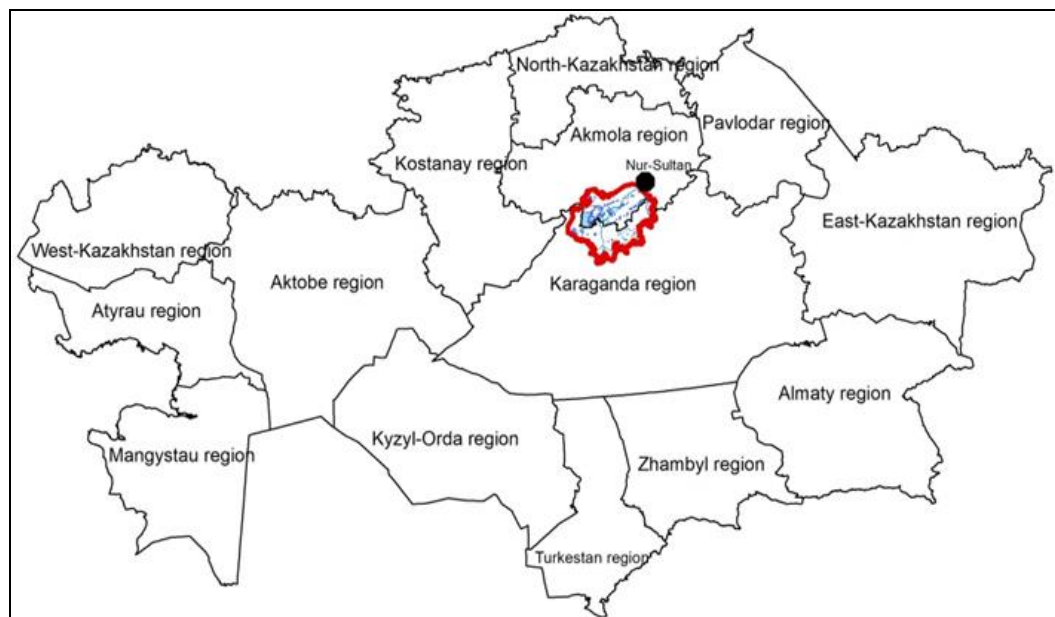


Figure 1. Geographical position of the Teniz-Korgalzhyn depression

This area forms a unique ecosystem for Kazakhstan, considering the landscape, wetlands and specific flora and fauna. For this reason in 1968 here was established the Korgalzhyn State Reserve as a special natural protected area. In 1974, the Teniz-Korgalzhyn wetlands were included in the Ramsar list. In 2002, Lake Teniz, the first and so far the only one in Kazakhstan, was included in the Living Lakes international network, which includes the most unique lakes in the world. At present, the territory of the Korgalzhyn State Reserve has been proposed for inclusion in the UNESCO list of natural heritage, including areas of particular importance for the conservation of wetland birds. The landscapes of the Teniz-Korgalzhyn depression are largely represented by wetlands. They act as a regulator of many processes: accumulation and storage of fresh water, water filtration, absorption from the atmosphere and carbon accumulation, oxygen circulation to the atmosphere, regulation of surface and underground runoff, stabilization of groundwater levels, participation in the formation of climatic conditions, containment of erosion processes, maintenance and conservation of biological diversity. In addition, they play an important role in the conservation and development of traditional natural resource management. Wetland landscapes provide many types of non-market and market services, and their total value exceeds the value of economic transformation.

There are numerous examples that show how much the economic value of natural landscapes exceeds the value of the transformed ones. This can include the Tourism, Fishing, Bird watching, Pastures, Agriculture etc (Barbier et al., 1997; Brander et al., 2003; Ilies & Wendt, 2015; Ilies et al., 2018; Gozner et al., 2017; Gozner, 2010).

OBJECTS AND METHODS OF RESEARCH

The following writings by Preobrazhenskiy, 1975; Mukhina, 1973; Kotlyarov, 1978; Chizhova, 2011) were used as a guide for this research work. Mironenko N. S. and Bochvarova M. (1986) justified the possibility of recreational systems as well as the diversity of evaluation methods. Therefore we represent the research area landscapes as a system. Good research work was done on evaluation of North Kazakhstan landscapes for recreation (Mazhitova et al., 2018). The article used materials on the recreational assessment of lake systems in Northern Kazakhstan (Nazarova et al., 2019).

Assessment of the ecosystem functions of landscapes was carried out within the largest wetlands in the specially protected natural areas of the Teniz-Korgalzhinsk depression: the Tengiz-Korgalzhinsk lake system in Central Kazakhstan (Figure 2). The work is based on collected data, expert assessments, materials of the nature records of protected natural areas and field observations of the authors.

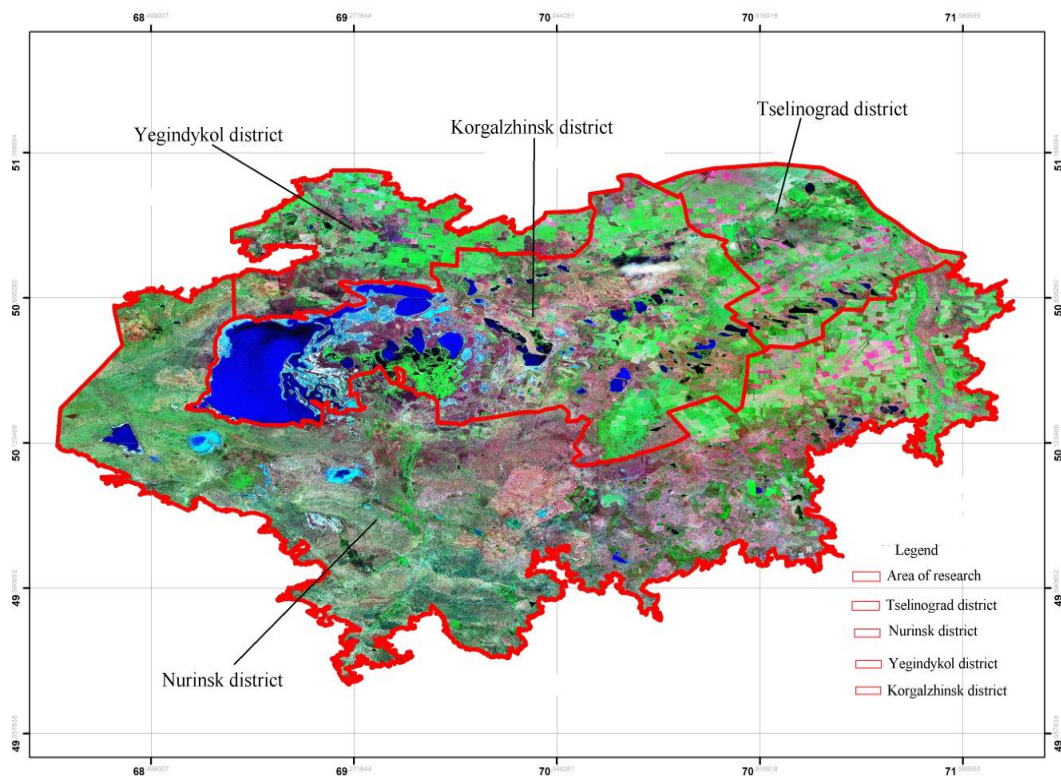


Figure 2. Satellite image. Teniz-Korgalzhyn depression

The understanding of landscapes' ecosystem functions is based on the perception of the territory as a complex active self-organizing system. It is at the same time forms a part of more large-scale system "nature - society". The analysis of inter-relations in the system

Landscapes of the Teniz-Korgalzhyn Depression: Evaluation of Ecosystem Functions and Opportunities for Tourism

allows to define the main ecosystem functions. The calculations are based on the concept of the total economic value of natural resources (Millennium of geo system Assessment, 2005). Today it is the most comprehensive approach to the assessment of natural resources and services (Table 1). The methodology takes into account several parameters that cover the direct cost of use, the indirect cost of use and the cost of non-use.

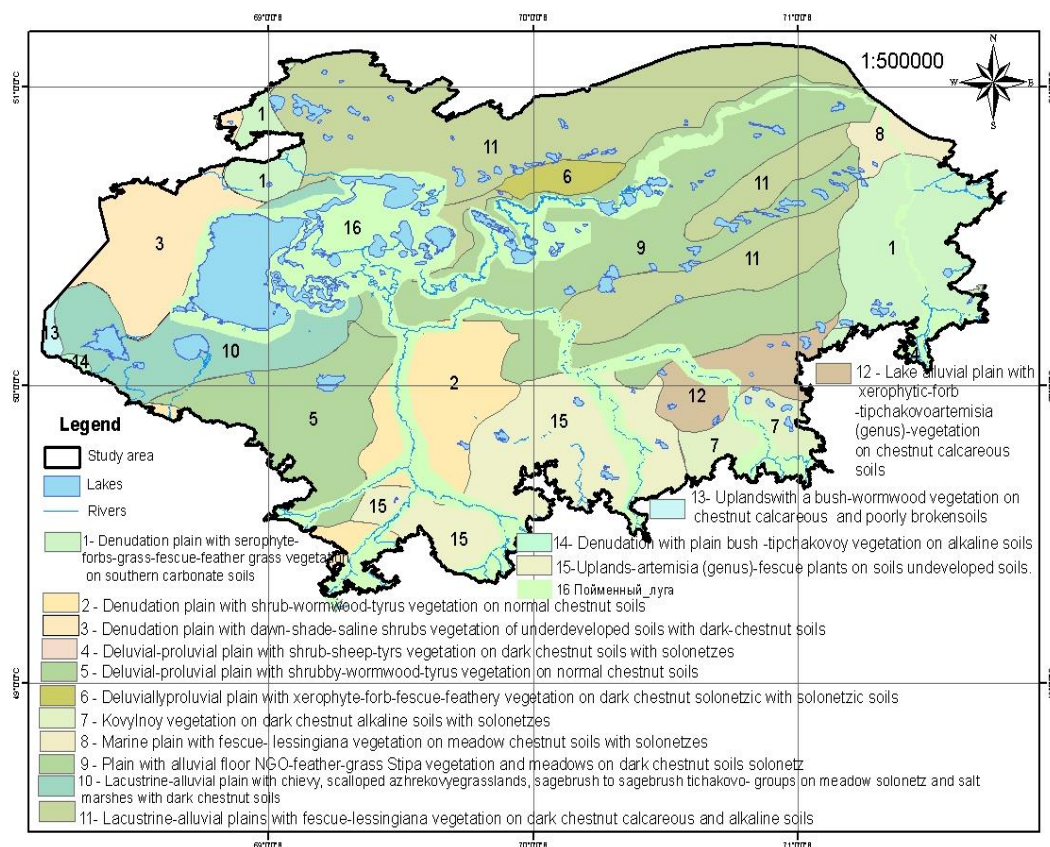


Figure 3. Natural landscapes of the Teniz-Korgalzhyn depression (Atlas of Wetlands of Kazakhstan..., 2009)

Table 1. Methodology for the implementation of economic valuation of natural resources and ecosystem services, provided in Kazakhstan wetlands

Natural resources and geosystems services	Used methods of economic valuation
Biodiversity	Normative method of compensation for damage
Grassland and pasture, tilled area	Market price method
Filtration (water treatment) capacity of lakes	Replacement Cost Method
Carbon sequestration	Volumetric conversion method
Tourism and recreation	The method of market prices, the method of transportation costs

General economic assessment. Assessment of the total economic value of wetland landscape services was carried out on the basis of the calculation of the following

indicators: economic assessment of natural resources, assessment of tourist and recreational potential, assessment of agricultural land, assessment of the filtering ability of wetlands, assessment of carbon dioxide binding to forest and meadow vegetation. A general economic assessment of natural resources, namely, the assessment of key animal species, was carried out using standard methods (Bobylyov, 2001). The calculations were carried out according to the nature resources records and annual reports of the Forestry and Hunting Committee of the Ministry of Agriculture of the Republic of Kazakhstan.

RESEARCH RESULTS

Economic assessment of wildlife

When calculating the economic value of biological resources, a tax-based method of economic assessment was used to calculate the amount of recovery for damage caused by illegal extraction or destruction of wildlife. The sizes of taxes are established at the national level by the Decree of the Government of the Republic of Kazakhstan No. 1140 dated September 4, 2001 "The sizes of compensation for harm caused by violation of the legislation on the protection, reproduction and use of wildlife." Valuation was carried out among hunting and commercial species of animals (birds and animals) that are at risk of extermination. The calculation is given by the formula (Bobylyov, 2001):

$$E = n \cdot Y,$$

where: E -is the economic value of a certain animal species in monetary terms,

n - is the number of individuals of this species recorded in the wetland,

Y - is the size of the fee for damage to the biological species.

The main hunting and commercial species of mammals on the territory of the studied wetlands are wild boar, fox, hares, marmots, muskrats, saigaks, corsacs, etc. It is these species that are more susceptible to intensive extermination during unorganized hunting, so now there are at risk: saigaks, moose, roe deer, gazelles and others.

The economic value of each species was calculated according to the key hunting and commercial species of mammals and birds for each wetland (The Most Important Wetlands, 2002). The most numerous species (ducks and geese) that were not included in the list of rare and endangered species were taken to calculate the valuation of hunting and commercial bird species. The calculations were carried out according to the same formula of the total economic value, but instead of the fees for causing harm, were taken the rates of payment for one hunting and commercial individual, which are established by the tax code of the Republic of Kazakhstan within the limit on the extraction of these species. Tax rates vary depending on the type of hunt: pay rates among amateur hunters are two times higher than those of hunters. The total cost of animals and birds in the territory of the Kazakhstan wetland was calculated according to the approximate cost of the main species of animals and birds (Table 2).

Table 2. The total value of animals and birds of Kazakhstan wetlands
(according to the Forestry and Hunting Committee of the Ministry of Agriculture of the Republic of Kazakhstan and to the Decree of the Government of the Republic of Kazakhstan № 1140 from 04.09.2001)

Name of the object	Value of commercial and rare species of mammals, \$ CHIA*	Value of commercial and rare species of birds, \$ USA	Value of main commercial-hunting species of birds, \$ USA	Total cost, \$ USA
Tengiz-Korgalzhyn system of lakes	1.022.765	78.590.703	170.795	79.784.263

Assessment of tourist and recreational potential

The cost of direct use of the territory for tourism was calculated by assessing the annual income received from the organization of excursions, exhibitions and other events in the buffer zones of Korgalzhyn Nature Reserve (Table 3). The total cost of the services provided includes the transportation costs of tourists, the provision of viewing platforms, the provision of bivouac glades, a visit to the Museum of Nature, the provision of catering facilities, and housing costs. It is worth noting that more than 80-85% of the costs are for housing costs and only 3-4% are for transport (Conservation Economy., 2002). Income data was taken from the official development programs of Akmola Oblast, oblasts for 2011-2018.

Table 3. Assessment of recreational potential of the main wetlands sites, which host tourists (according to the data of the District Development Programs of 2011-2018)

Name of the object	Infrastructure	Transport accessibility to major administrative centers	Average tourist flow, persons/year	Cost, \$ USA
Korgalzhyn Nature Reserve (Korgalzhyn village)	Six guest houses, three hotels, five cafes, a home kitchen, two restaurants, a nature museum, hunting grounds, etc.	130 km to Nur-Sultan city, 2 hours of driving	4500	766700

As can be seen from table 3, Korgalzhyn Nature Reserve received an average of 4500 visitors yearly, which contribute to the income from the tourism activities. Considering that total visitors in the region of Teniz-Korgalzhyn depression was more than 28 thousand people in 2018, there is a potential for the growth of the tourism income. Therefore, we can conclude that most tourists do not use the services of tourist organizations and, most likely, unorganized tourism predominates in this territory. The main type of tourism in the protected areas is associated with the scientific and educational interest of visitors. Visitors are accepted by the administrative center of the reserve in the Korgalzhyn village and the ecotourism activities are encouraged. The greatest development of tourism is promoted by the Korgalzhyn district, which is due not only to the rich tourist and recreational potential, but also to the significant funding coming from Nur-Sultan.

Economic valuation of natural resources of agricultural land

Agricultural land of the studied region consist of pastures, hayfields and tilled fields. Pastures prevail within all wetlands under consideration. They occupy from 50% in the Tengiz-Korgalzhyn system of lakes to the 95% of the whole depression. Harvesting hay and green fodder is carried out by local residents who have livestock in their personal households. The maximum share of tilled fields was recorded in the Korgalzhyn district - up to 47%, for the rest of the districts it ranges from 14% to 20%. Hayfields occupy small areas from 3% to 6% (Table 4).

Table 4. The structure of agricultural land on Kazakhstan wetlands (according to the data of the District Development Programs of 2011-2018, and to the Ministry of Agriculture of the Republic of Kazakhstan)

Type of agricultural lands	Haylands		Tilled fields land		Tilled fields		Total agricultural lands, ha
	ha	%	ha	%	ha	%	
Tengiz-Korgalzhyn system of lakes	16.863	3.1	268.719	49.4	258.384	47.5	543.966

Tengiz-Korgalzhyn depression is characterized by the development of agricultural production. The main direction of agriculture is the production of grain. Unlike the Tengiz-Korgalzhyn agricultural system, the structure of farmland in the Nura district is

dominated by pastures. The leading role in the economy of the Nura district belongs to the production of agricultural products. It is worth noting that in recent years, the coal industry has begun to develop actively. Economic valuation of agricultural land, namely pastures, grasslands and tilled fields, was carried out on the basis of the market valuation method. The assessment is based on indicators of the yield of farmland types and market prices of their main products (Table 5). Filtration ability of wetlands. One of the most important regulatory functions of wetlands is the accumulation, storage and purification of fresh water. Riding bogs and lakes are highly effective in wastewater treatment. The Teniz-Korgalzhyn system of lakes includes several tens of small and 2 large salt lakes Tengiz and Korgalzhyn, the water volumes of which are 955 million m³ and 386 million m³, accordingly. The volume of fresh lakes is much smaller - 511 million m³ (Globally significant, 2007). Fresh lakes of the Teniz-Korgalzhyn depression are represented by lakes of two groups: Besshalkar and Uzynkol-Zharlykol (Bragin et al., 2002).

The most desalinated body of water in the Alakol-Sasykkol system is Sasykkollake. It is located in the northwestern part of the Alakol depression and has the largest volume of water among the studied objects - 2.43 billion m³. More than 45 thousand ha of bogs adjoin the lake (Wildlife reserves, 2006). The Ural River is the only major source of fresh water in the Ural Delta system and the adjacent coast of the Caspian Sea. Annually, it brings in more than 8 km³/s of fresh water (Wildlife reserves, 2006). This is the second largest freshwater runoff after the Volga river brought to the Caspian Sea. The basin of the Syr-Darya River, the largest of the rivers flowing into the Aral Sea and feeding it, has been used since ancient times as a region of irrigated agriculture. Intensive water intake from the river for irrigation led to a decrease in the annual flow coming to the Aral Sea, which led to the Aral Sea disaster. Until the 1950s, the annual flow of the river was 22-45 km³/s, but since 1974, the flow has decreased to 1.3 km³/s (Biodiversity, 2012). Currently, the annual freshwater flow in the Syr Darya is about 6 km³/s.

Table 5. Economic value of hay on Kazakhstan wetlands (according to the data of the District Development Programs of 2011-2018, and to the Ministry of Agriculture of the Republic of Kazakhstan)

Name of the object	Hayland, ha	Cost of hay, thousand \$ USA	Grazing land, ha	Cost of solage, thousand \$ USA	Tilled land, ha	Wheatcost, thousand \$ USA	Total cost of agricultural lands, thousand \$ USA
Tengiz-Korgalzhynsystem of lakes	16863	139.9	268719	5229.3	258384	58136.4	63505.6

The cost of indirect use of lakes and bogs was estimated by their filtering ability in comparison with the filtering ability of an industrial treatment plant (ITP), the transmittance of which is 1500 m³/day, the average price reaches \$ 50 thousand, and the service life is not less than 50 years. In the course of work, the average price for 1 m³ of fresh water was calculated, which amounted to \$ 0.002. The calculations were performed as follows: the number of days in a year was multiplied by the transmittance of the ITP in order to obtain the amount of fresh water that is filtered by one ITP for its entire operational period (on average 50 years). Further, in order to obtain the cost of 1 m³ of purified water, the price of ITP was divided by the amount of fresh water that ITP purifies in 50 years. As a result, the total cost of water treatment services for wetlands amounted to more than \$ 6 million (Table 6).

The binding of carbon dioxide. Forest and meadow vegetation, confined to wetland ecosystems, in the process of photosynthesis absorbs carbon dioxide and releases oxygen,

thereby purifying the atmospheric air. Such benefits provided by the ecosystem can be used in calculating the indirect value of wetlands. Their biological productivity per year was taken based on the calculation of carbon deposition values by forest and meadow communities. Forest vegetation in the studied areas is represented by coniferous and small-leaved forests, broad-leaved and tugai forests stand out in the eastern mountainous part. Meadow vegetation is represented by different types of meadows. These include real, marshy, steppe and halophytic meadows. Meadows are confined to special, additionally moistened habitats: floodplains of rivers, lakes, depressions, dry beds, groundwater outlets, etc. According to the Forestry and Hunting Committee of the Ministry of Agriculture of the Republic of Kazakhstan, the productivity of forests in Kazakhstan, which are combined with wetlands, is quite low - about 0.7 m³ per hectare.

Table 6. Economic cost of the filtration capacity of Kazakhstan wetlands
(according to the data of the District Development Programs of 2011-2018)

	Naurzum system of lakes	Delta of Ural river and the adjacent coast of the Caspian Sea	Teniz-Korgalzhyn system of lakes	Alakol-Sasykkol system of lakes	Small Aral Sea and Syr-Darya river's delta
Volume of fresh water, m ³	93.8 mln.	8000***	511 mln.	2.43 billion	6000***
Cost of wetland filtration capacity, \$ USA	187600	16	1022000	4860000	12
Total	6 mln. 72 thousand 622 \$				

Notes to table 6: *** – the annual flow of freshwater (m³/s), coming into the reservoirs.

The value of forest productivity is necessary for calculating the amount of carbon dioxide absorbed from the atmosphere per 1 hectare of forest land. This value was multiplied by a coefficient of 0.63 (volume conversion coefficient, the choice of which depends on the natural zone, breed and age of the plant; (Bobylyov, 1999), necessary to convert the volume of productivity to weight, then the resulting value is multiplied by a coefficient of 0.45 (it shows carbon content in wood) and then the result was multiplied by a coefficient of 3.66 to convert carbon to carbon dioxide (this coefficient is presented in the method according to Bobylyov, 2001). As a result, it turned out that 1 ha of forest land deposits 0.7 tons of carbon dioxide. The same technique was used to calculate the amount of carbon deposited in meadow vegetation.

One hectare of meadow land annually sequesters 0.45 tons of carbon. The amount of carbon sequestered by meadows is multiplied by a coefficient of 3.66 to convert its mass to the mass of carbon dioxide. The result obtained is the mass value of carbon dioxide bound by 1 hectare of meadow, and is 1.6 tons. The price for 1 ton of carbon dioxide was accepted in the amount of US \$ 10 (Bobylyov, 2001). One hectare of forest land in the territory of the considered wetland systems binds carbon dioxide in the amount of \$ 7. One hectare of meadow land sequesters \$ 10.3 carbon dioxide.

As a result of the calculations, the Teniz-Korgalzhyn system, the cost of which in the carbon market would be \$ 4861630 (Table 7), is of the greatest value in the service of carbon deposition and air purification. This is explained by the largest area with favorable conditions for the development of meadow and forest vegetation. Favorable conditions are due to climatic features of the region and uniform access of water, due to a whole system of large and small lakes remote from each other at small distances, occupying the Teniz-Korgalzhyn depression and its plains, plateaus and small hills. The Alakol-Sasykkol system is the second by area and by the amount of carbon sequestered.

The cost of absorbing carbon dioxide here is \$ 3.933.650. The area of local forest land is much smaller, since the conditions for their development are very different from the Teniz-Korgalzhyn system. Wetland occupies the Alakol-Sasykkol intermountain basin section between the mountain systems of Zhetysu Alatau and Tarbagatai. The location of the territory in the Alakol depression determines the special climatic regime of the region. First of all, changes in the hydrothermal regime are caused by inversion processes - the influence of mountains and the hollow effect. The entire lake and wetland ecosystem complex is formed in an arid desert climate. The least absorbing carbon dioxide is the territory of the Small Aral Sea and the Syr-Darya River (Ospanova, 2012).

The area of the wetland is significantly inferior to the areas of the Teniz-Korgalzhyn or Alakol-Sasykkol systems, and its main part is represented by the water surface. It is worth noting that the obtained values are very approximate, since the calculations did not fully take into account the so-called carbon benefit, which is understood as the specificity of the age and structural composition of the stands and their full composition.

Table 7. Cost of carbon sequestration of Kazakhstan wetlands
(according to the Development Programs of the Regions of 2011-2018, and to the Decree of the Government of the Republic of Kazakhstan № 1140 dated September 4, 2001)

Name of the object	Meadows area, ha	Area of forest lands, ha	Carbon sequestration, t			Carbon market value, \$USA
			Meadows	forests	total	
Tengiz-Korgalzhyn system of lakes	268.719	62.261	442.580	43.583	486.163	4.861.630

DISCUSSION

The results of the study and calculations allow us to state that in the structure of the total economic cost of environmental services of all wetland landscapes of the study area, the main share is the cost of natural components - mainly flora and fauna, as well as the cost of agricultural products, carbon deposition, typical for regions with large areas of forest and meadow land. As can be seen, the ratio of the cost of the ecological functions of wetland landscapes for the considered model protected areas is different and depends on the hydroclimatic and landscape features of the territory, as well as on its biodiversity and degree of development. The results of the economic assessment of environmental services of protected areas provide an informative basis for solving a wide range of management tasks - determining the share of protected natural areas in the gross domestic product of Kazakhstan, the direction of development of protected areas, defining environmental management regimes, financing protected areas and timely adoption of necessary measures to preserve ecosystem biodiversity. Currently, Korgalzhyn Nature Reserve accepts organized collective and individual tourists. Tours and routes are organized over Korgalzhyn visiting center. One of the most important objective in the Korgalzhyn Nature Reserve is the Flamingo eco-route (155km).

The example of sightseeing tour: Visit to the monument of cultural heritage "Dudarai", the mausoleum "Batygay" mazar "Kanykey". This will introduce tourists to the legends and traditions of the region. On the lake Shopak can be observed different endangered bird species as cormorants, swans and curly pelican, the largest bird in the reserve, almost all summer large flocks of waterfowl and near-water birds gather on the Eiseiskaya Spit. Further, on the Kendyktylake, you can see the pink flamingo-brand of the Korgalzhyn Reserve, large concentrations of waders, on Lake Saumalkol - can be observed the endangered species as duck-stiff tail, swans, geese, and other. In the steppe

can be seen badger, fox, wild boar, saigak and geese. On the Karazhar site can be organized a small rest and lunch, with the returning route.

CONCLUSIONS

The results of the study led to the following conclusions:

1. Among all the classes of animals considered in this paper, commercial and rare bird species are of the greatest economic value. Moreover, the total economic value of species varies significantly in wetlands. The maximum value of the indicator is characteristic of the Teniz-Korgalzhyn system of lakes, which is due to the large size of populations of rare bird species.

2. The Korgalzhyn Nature Reserve has the greatest tourist and recreational potential in the whole central Kazakhstan, which is explained by the recreational attractiveness of the territory and the favorable position and socio-economic situation. The main type of tourism and recreation is ecotourism, as scientific and educational value. The buffer zone of the Alakol reserve is characterized by the largest influx of tourists, but incomes remain low. This can be explained by the predominance of unorganized type of tourism.

3. Wetlands are characterized by features in the structure of agricultural land, which are characterized by a predominance of pasture in their composition, due to the aridity of the climate. In the Teniz-Korgalzhyn system of lakes, the share of pastures and tilled lands is approximately the same. Differences in the structure of agricultural land are caused by natural conditions (climatic conditions, topography, soil fertility, etc.). As a result of economic assessment of agricultural land, it was found that the highest values of the indicator are the lands of the Teniz-Korgalzhyn and Alakol-Sasykkol systems of lakes, which is explained by the large areas of pastures, hayfields and tilled lands. The smallest values are observed on the wetlands of the Naurzum system of lakes and the Small Aral Sea with the Syr-Darya River Delta.

4. The highest economic cost of filtration capacity is characteristic for the Teniz-Korgalzhyn and Alakol-Sasykkol systems of lakes.

5. The value of the carbon deposition service depends on the area of forest and meadow land, the productivity of vegetation. The productivity of forest and meadow vegetation of wetlands is at a very low level (0.7 m³ / ha). The area occupied by forests and meadows varies widely among wetlands, due to the natural conditions of their formation. The greatest value in the service of carbon deposition is characterized by the Teniz-Korgalzhyn lake system.

6. In the structure of the total economic cost of environmental services of all wetlands of Kazakhstan, the main share is the cost of natural resources, then follows the cost of agricultural land production. An exception is the Alakol-Sasykkol system of lakes, in which the share of the cost of natural resources and agricultural land production is almost the same. In the structure of the total economic value of the ecological services of the wetlands of the Naurzum system of lakes, a significant share of the cost of the services of carbon deposition is explained by the relatively large areas of forest and meadow lands. The Alakol-Sasykkol system of lakes is characterized by an increase in the percentage of filtering ability of wetlands.

7. The Korgalzhyn-Teniz depression have the high tourist potential, due the unique ecological system, variety of natural landscape, central location between important cities. It can develop the ecotourism activities and grow the income from the tourist and economically connected activities. At the same time it is important to keep the naturally protected areas and preserve the wild environment of the region.

REFERENCES

- Barbier, E.B., Acreman, M., & Knowler, D. (1997). Economic Valuation of Wetlands. A guide for policy makers and planners. Ramsar Convention Bureau. Switzerland, Gland, 127 p.
- Bobylyov, S.N. & Tishkov, A.A. (1999) Economic assessment of biodiversity. Moscow, 112 p.
- Bobylyov, S.N., Sidorenko, V.N., & Luzhetskaya, N.V. (2001). The Economic Basics of Wetland Conservation. Moscow, 56 p.
- Bragin, E.A., & Bragina, T.M. (2002). Naurzum system of lakes. The most important wetlands of Northern Kazakhstan. Russian University. Moscow, 101-114 pp.
- Brander, L.M., Florax, R.J.G.M., & Vermaat, J.E. (2003). The Empirics of Wetland Valuation: A Comprehensive Summary and a Meta-Analysis of the Literature. Amsterdam, Institute for Environmental Studies (IVM), Vrije Universiteit, 29 p.
- Gozner, M. (2010). Tourism in the Territorial System Albac – Arieseni sistemul teritorial Albac and its impact on the environment. *Analele Universității din Oradea*, Fascicula Construcții și Instalații Hidroedilitare, vol. XIII – 2, Editura Universității din Oradea.
- Gozner, M., Tătar, C.F., Stupariu, M. & Măduța, M.F. (2017), Nature, Photography and Tourism in Bihor-Vlădeasa Mountains (Romania), *GeoJournal of Tourism and Geosites*, Year X, Volume 20, Oradea-Gdansk, Romania-Poland, Editura Universității din Oradea.
- Ilies, D.C., Buhas, R., Ilies, M., Ilies, A., Gaceu, O., Pop, A.C., Marcu, F., Buhas, S.D., Gozner, M., & Baias, S. (2018). Sport Activities and Leisure in Nature 2000 Protected Area – Red Valley, Romania. *Journal of Environmental Protection and Ecology*, 19, No 1, 367–372.
- Ilies, A., & Wendt, J.A., (2015). Tourism geography. The basic of theory and application issues. [*Geografia turystyczna. Podstawy teorii i zagadnienia aplikacyjne*]. Wydawnictwo AWFIS, Gdańsk.
- Kotlyarov, Y.A. (1978). Geography of Tourism and Recreation. Formation and Development of Territorial Recreation Complexes. M.: Mysl, p. 238.
- Mazhitova, G.Z., Pashkov, S.V., & Wendt J.A. (2018). Assessment of landscape-recreational capacity of north kazakhstan region. *GeoJournal of Tourism and Geosites*, 23 (3), 731–737.
- Mironenko, N. S., & Bocharova, M. (1986). Recreational systems. Publishing house of Moscow University, Moscow, 136 p.
- Mukhina, L.I. (1973). Principles and methods of technological assessment of natural complexes. M.: Nauka, p. 96.
- Nazarova, T.V., Fomin, I.A., Dmitriev, P.S., Wendt, J.A., & Janaleyeva, K.M. (2019). Landscape and limnological research of lake systems of the plain areas of the Northeastern borderlands of the Republic of Kazakhstan and assessment of their recreational capacity. *GeoJournal of Tourism and Geosites*, 25(2), 485–495 pp.
- Ospanova, M.O. (2012) Biodiversity of wetlands in the outposts of the Syr-Darya River. Almaty, 65 p.
- Preobrazhenskiy V.S. Antipova A.V., Vedenina Yu.A., & Danilova N.A. (1975). The theoretical basis of recreational geography. Exec. edit. M.: Nauka, p 224.
- Yashchenko, R.V. (2006). Reserves of Central Asia and Kazakhstan. Materials of the IUCN project “Evaluation of the Management Effectiveness of Central Asia and Kazakhstan Reserves”. Vol. 1. Tethys. Almaty, 352 p.
- Zavadskaya, A.V., Nikolaeva, E.A., Sazhina, V.A., Shpilenok, T.I., Shuvalova, O.A. (2017). Economic assessment of natural resources and ecosystem services of the Kronotsky Reserve and the South Kamchatka Reserve. Kamchatpress, Petropavlovsk-Kamchatsky, 244 p.
- *** Atlas of Wetlands of Kazakhstan. 2009. Astana. 84 p.
- *** Millennium of geo system Assessment (2005) World Resources Institute, Washington, 69 p.
- *** Syrdarya Region Development Program until 2020. 2012. [Electronic resource: <http://kostanay.gov.kz/programmy-razvitiya-territoriy> (accessed on September 22, 2013).]
- *** The development program of the East Kazakhstan region until 2020. 2012. [Electronic resource: <http://kostanay.gov.kz/programmy-razvitiya-territoriy> (accessed on September 22, 2013).]
- *** The globally significant wetlands of Kazakhstan. 2007. In 3 volumes. Astana: Printing House Complex. T. 1.264 page; T. 2.271 page; T. 3.27 page.
- *** The official website of the Committee for Forestry and Wildlife of the Ministry of Agriculture of the Republic of Kazakhstan. [Electronic resource: <http://www.fhc.kz> (accessed in January 15, 2014).]

Submitted:
26.08.2019

Revised:
01.11.2019

Accepted and published online
04.11.2019

CHEF'S COMPETENCY AS A KEY ELEMENT IN FOOD TOURISM SUCCESS: A LITERATURE REVIEW

Tuatul MAHFUD*

Yogyakarta State University, Graduate School, Colombo St. No.1, Yogyakarta 55281, Indonesia;
Balikpapan State Polytechnic, Hospitality Department, Soekarno Hatta St. Km. 8,
Balikpapan 76126, Indonesia; e-mail: tuatul.mahfud@poltekba.ac.id

PARDJONO

Yogyakarta State University, Graduate School, Colombo St. No.1,
Yogyakarta 55281, Indonesia; e-mail: pardjono@uny.ac.id

Badraningsih LASTARIWATI

Yogyakarta State University, Department of Food Engineering Education,
Colombo St. No.1, Yogyakarta 55281, Indonesia; e-mail: badra@uny.ac.id

Citation: Mahfud, T., Pardjono, & Lastariwati, B. (2019). CHEF'S COMPETENCIES AS A KEY ELEMENT IN FOOD TOURISM SUCCESS: A SHORT LITERATURE REVIEW. *GeoJournal of Tourism and Geosites*, 26(3), 1057–1071. <https://doi.org/10.30892/gtg.26329-417>

Abstract: The chef expertise is considered a key to food tourism success. However, studies to identify the competencies of successful chefs are still scarce. This literature review study aims to identify the chef's skill to succeed in his career. There are 83 relevant articles reviewed using the grounded theory method. The results reveal that the chef's competencies include functional competencies, core competencies, and general competencies. The chef's functional competency is culinary expertise that provides for cooking skills, taste and food knowledge, and service tightening. Chef's core competencies include conceptual ability, cleanliness, and business sense. Meanwhile, general competence consists of interpersonal, leadership, managerial, and motivational skills. The identification of chef competencies is used as a guide for culinary educators and trainers for sustainable careers development in the culinary profession.

Keywords: chef, competencies, culinary, hospitality, food tourism

* * * * *

INTRODUCTION

Food tourism has been identified as a nation's vital potential in the future, especially in improving the country's economy (Ian, 2016). Food tourism can increase the interest of tourists to visit a country as a tourist destination, and simultaneously also affect the country's economic improvement (Sharma & Sharma, 2019). Previous studies have stated that which influences tourist satisfaction is the quality of tourism products,

* Corresponding author

including culinary products (Kalebos, 2016). Also, culinary motivations form one of the reasons tourists travel to particular destinations (Expedia, 2016). Approximately 20%-30% of total travel expenses are allocated to the food and beverage sector, most referring to restaurants (Paulsson, 2014). This encourages food producers, including hotels, restaurants, caterers, to competitively meet the needs of culinary tourism experiences of tourists (Hall & Sharples, 2003). The tourist's satisfaction in their culinary travel experience is mostly determined by how well the quality of the culinary products is presented (Kristanti et al., 2018). Meanwhile, the quality of the culinary products also depends heavily on the skills of the chef in processing culinary products.

This culinary quality is considered to significantly affect the experience of customers visiting places to eat (Chen et al., 2016). Thus, the chef's skills for processing and serving culinary products are the primarily key to the success of food tourism. Chefs are culinarians in their professional fields, preparing food and dishes in all ways of operating a restaurant. The chef is known as a professional cook or commonly known as the chief cook in a restaurant or hotel (Oxford Dictionary Online, 2019). The roles of a chef are plentiful, as he is seen as a manager, innovator, taste expert, and artist by many people both inside and outside the culinary field (Culinary Institute of America, 2012). The chef's ability to present a pleasant dining experience for guests is considered very important. Therefore, their creativity in finding new ideas and creating culinary dishes is the primary key to providing a positive experience of guest dining. Chef, as one of the creative people in tourism development, is a valuable resource (Zhang & Yu, 2018). Pang (2017) suggests that chefs play an essential role in providing content that encourages gastronomic discourse and also in providing a good experience on the plate to visitors.

In many tourism and hospitality literature, the chef role is said to be very vital and needs to get more attention, especially for developing the chef's capacity and ability to support the success of food tourism. Presently, although becoming a chef is easier now than before, becoming a professional chef is considered much more difficult, especially for newcomers (Baldwin, 2018). Learning the criteria for becoming a professional chef is one way to prepare a professional chef. One of the ways of developing professional chefs can be through culinary vocational training that gives chefs the ability to make dishes that inspire visitors' imagination (Pang, 2017). Similarly, culinary education institutions can prepare individuals to acquire culinary skills/knowledge that they will master (Müller, VanLeeuwen, Mandabach, & Harrington, 2009). Then the question is, what are the criteria for becoming a professional chef? The development of the chef's profession is a critical aspect for food tourism success, it is thereby strongly considered necessary to identify the competency needs of professional chefs. Therefore, the scope of this paper synthesizes the literature on chef competency as a critical element to food tourism success. The literature review of this study includes a discussion of the misperception of the meaning behind chef, the dimensions of competence, and the chef's competence. The results of the chef's competence literature study can be used as a reference for educational and training institutions to prepare prospective workers or for chefs to improve their skills.

METHODS

This study adopts a literature review approach. The selection of this study approach is intended to reveal the misperception of the chef meaning, the chef's competence definition, and the chef's competence. This literature review method refers to grounded theory (Wolfswinkel et al., 2013) that allows researchers to identify gaps in the field and to build theoretical models based on emerging results. The literature review process refers to the steps proposed by Wolfswinkel et al. (2013). According to their study, there are five steps in conducting the literature review method, which include: 1) determining criteria; 2)

search; 3) choose; 4) analysis (synthesis), and 5) presentation. Literature review of this study uses criteria for topics on chef competency and the literature sources include articles in journals published from 2000 to 2019. The range of articles in this study by searching databases such as the Emerald page (<https://www.emerald.com>), Taylor and Francis online (<https://www.tandfonline.com>), and Science Direct (<https://www.sciencedirect.com>). Searched keywords used were "chef" OR "chef skill" OR "chef competencies" OR "chef core competencies". Furthermore, the selected articles were chosen based on their suitability for this study, totaling 83 articles consisting of 29 articles from Emerald publications, 22 articles from Taylor and Francis Online publisher, and 32 articles from Sciencedirect.

RESULTS DISCUSSIONS

From the literature review about chef competence, 83 empirical studies were found whose findings answered this study question. The article review results are grouped into three sub-sections, namely misconceptions about the chef definition, the chef's competence definition, and the chef's competence.

Misconceptions about the chef definition

The term chef often used synonymously to "cook". When referring to the two terms, it is important to note that the use of each term has a different meaning. Although there is no single professional organization that precisely determines the meaning of cooks and chefs, most studies agree that the difference lies in education and experience. Someone who has just started cooking in a home kitchen or just entered the cook's profession at a regular restaurant is called "cook". However, if someone who has a culinary degree through education or training by a professional chef, is usually considered a chef. In other words, it can be concluded that "cook" has a lower rating than "chef".

On the one hand, the term chef in English refers to its French origination, namely chef de cuisine, which means the head of the kitchen. The word "chef" is usually used in professional job positions in the hospitality sector. According to Oxford Dictionary Online (2019), the term chef is a professional cook or commonly known as the chief cook in a restaurant or hotel. Thus, the chef is one who is professionally trained, proficient in all aspects of food preparation and often focuses on certain dishes. According Jones (2011), the chef criteria includes having a two or four year culinary education degree (diploma), taking extensive training under a chef with the aim of getting culinary education equivalent to a bachelor's degree (also known as a culinary apprenticeship), having responsibilities including supervisory roles, has the ability to create and implement menus, and is able to manage the kitchen. Referring to the organizational structure within the kitchen, the profession of chef has different position levels and consequently different job descriptions at each level of office. The levels of chef positions in professional kitchens ranging from the highest to the lowest, include executive chef, sous chef, chef de partie, demi chef, commis (cook), and cook helper. In the structure of the chef position in a professional kitchen, it can be found that the term cook refers to, or is equivalent to, the position of commis. Commis has the duty and responsibility to prepare and process the basic raw materials. On the other hand, cooks or chefs in the general sense are meaningful as people who prepare food to eat (Oxford Dictionary Online, 2019).

Another definition, "cook" is a profession for individuals who prepare food for consumption in the food industry in settings such as in restaurants (Wikipedia, 2019). The cook criteria include being able to prepare food, being able to perform kitchen tasks according to needs and direction, being able to clean the kitchen area, being able to implement recipes or other people's menu plans, and still at the level of learning in his career (Jones, 2011). Thus the two terms between cook and chef in a professional manner cannot be equated. This study uses "chef" term for literature review.

Definition of chef's competence

In a general approach, competence can be characterized as a combination of knowledge, skills, and attitudes needed to work well in certain situations in a profession setting (Verhaeghe et al., 2011). According to ASEAN (2013), competency is all about verifiable performance, which includes knowledge, skills, and attitudes related to a system or a set of minimum standards needed for effective performance in the workplace. According to Dumitrescu et al. (2014), competency includes not only a set of knowledge, but also a set of abilities, attitudes, and values. Meanwhile, Tuparova et al. (2014) express competencies as a combination of knowledge, skills, and attitudes that are appropriate to the context. The knowledge aspect identifies what knowledge is needed for a person to work in an informed and effective way. The aspect of skills describe the application of knowledge to situations where understanding is transformed into work results. The attitude aspect explains the reasons for the establishment behind the need for specific knowledge or why skills are done in a certain way. Competence covers all aspects of performance in the workplace and involves, among others: performing individual tasks, managing various tasks, responding to possibilities or damage, dealing with responsibilities at work, working with others (ASEAN, 2013). Chef competency definition was expressed by Birdir and Pearson (2000), where according to him the chef's competence is the skill, ability, knowledge, and other attributes that encourages a successful chef. The chef is successful not because they know how to cook, but because they understand the influence of food on a plate (Pratten, 2003). According to Pratten (2003), mastering cooking techniques does not guarantee one to become a successful chef. That is, being a successful chef requires another set of competencies to support cooking skills. Thus, chef competence is a standard criterion including the knowledge, attitudes, and skills needed for the role and function as a chef.

Chef's Competency

At the eleventh meeting of the ASEAN Task Force on Tourism Manpower Development, there was a set of minimum competency standards within the framework of qualifications for professionals in travel, housekeeping, front office and food and beverage service companies. These competency standards are based on the competencies needed to carry out a series of positions that are mutually agreed upon in companies within the tourism sector. The competency standards development known as the ASEAN Common Competency Standards for Tourism Professionals (ACCSTP) is based on the concept of competence which consists of knowledge, skills, and attitudes that must be owned and obtained by individuals to work effectively in the workplace (ASEAN, 2013).

Competency standards for tourism professionals listed in the ACCSTP Framework are minimum competency standards (knowledge, skills, and attitudes) that can be accepted and needed by industry and employers as the skill standards of people who meet the requirements to be recognized and valued fairly in ASEAN countries. The minimum competency or minimum terms only refers to the basic skills needed for a particular job description. In the ACCSTP Framework, competency components that include knowledge, skills, and attitudes are represented in three related skill groups, namely functional competencies, core competencies, and generic competencies. Functional competencies are the particular competencies needed to perform roles or jobs in the division of work and include skills and specialized knowledge (know-how) to work effectively, such as the ability to receive and process orders, provide housekeeping services for guests, and operate bar facilities (ASEAN, 2013). Furthermore, according to ASEAN (2013), core competencies are competencies agreed upon by industry, and it is essential to be achieved by a person in order to be accepted as a competent workforce in a particular primary division of labor. These competencies are directly related to the main work tasks and include units such as working effectively with colleagues and customers and implementing occupational health

and safety procedures (ASEAN, 2013). Whereas general competence is a competency agreed upon by the industry, and it is vital to be achieved if a person must be accepted as a competent workforce in a particular secondary work division. General competence is often associated with the term life skill, the ability to use common tools and technology, and the ability to manage and resolve conflict situations. Referring to the understanding of the three groups of competencies (core competencies, general competencies, and functional competencies), it can be concluded that the chef's skills include all three elements consisting of core competencies, general competencies, and functional competencies (Figure 1).

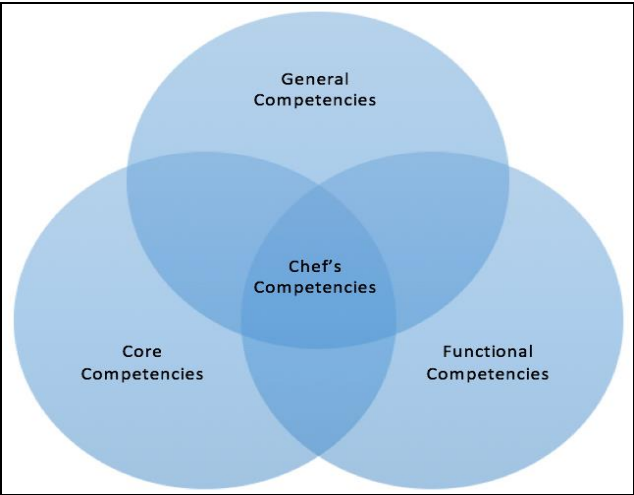


Figure 1. Chef's Competency Dimension

The synthesis to the chef's competency in the literature review study is a reference to the three competency dimensions consisting of functional, core, and general competencies. The results of previous studies on chef competencies are grouped into three dimensions. Furthermore, these three dimensions are broken down into several critical competencies needed for chefs to become successful and professional. The dimension of functional competency points to the chef's culinary skills such as the knowledge of cooking techniques, taste knowledge, culture, and presentation of food. The core competency dimension includes conceptual skills (creativity and aesthetics), business sense, cleanliness, and food security. Finally, the general competence dimensions of chefs include interpersonal, leadership, managerial, and motivational skills. Table 1 presents the results of the literature synthesis reviewing the ability of chefs from previous studies. In their study, Birdir and Pearson (2000) aimed at identifying the competency needs of a chef through the use of the Delphi technique, and revealed that there were ten main priorities of a chef's competence, namely: (1) knowledge of taste; (2) knowledge about food sanitation; (3) the ability to distinguish quality levels in food products; (4) general communication skills (verbal, written, listening); (5) ability to make decisions; (6) the ability to conceptualize new products, processes, systems; (7) the ability to control the ego; (8) the ability to see thoroughly (big picture); (9) the ability to work in a multi-task environment; (10) the ability to prioritize projects. Meanwhile, another study conducted by Hu (2010) aimed at investigating the core competencies of chefs through in-depth interviews, Delphi and Analytic Network Process (ANP). The study revealed that there are seven essential dimensions of chef's core competencies, namely product mastery, culture, management, service, aesthetics, creativity, and technology. A chef must be able to develop various skills,

ranging from hard skills related to cooking to soft skills related to working with, and managing, work teams. According to Doyle (2018), there are ten lists of the most essential skills for a chef, namely: attention to detail, business sense, cleanliness, creativity, culinary expertise, fast-paced decision making, motivational, multitasking, organization, team player.

Table 1. Chef Competencies Identification

No	Dimension	Competency	Indicator	Source
1	Functional Competence	Culinary expertise	Food processing	Antun & Salazar (2005); Zopiatis & Constanti (2007); Hegarty (2008); Hegarty & Antun (2010); Bosselman (2016); Johnston & Phelan (2016); Doyle (2018)
			Foodservice knowledge	Zopiatis (2010); Chen et al. (2016)
			Knowledge of culinary taste	Zopiatis (2010); Ulloa (2019)
			Food knowledge and culture	Birdir & Pearson (2000); Palmer et al., (2010); Yang & Mattila (2019)
			Knowledge of recipes and menu development	Zopiatis (2010)
2	Core Competence	Conceptual	Innovation	Ottenbacher & Harrington (2007); Robinson & Barron (2007); Cousins, O'Gorman, & Stierand (2010); Hu (2010); Zopiatis (2010); Hoholm & Strönen (2011); Stierand & Dörfler (2012); Hjalager et al., (2015); Abecassis-Moedas, et al., (2016); Bharwani et al., (2019)
			Change	Zopiatis (2010)
			Artistic culinary creativity	Horng & Hu (2008); Chuang et al., (2009); Hu (2010); Robinson & Beesley (2010); Zopiatis (2010); Stierand & Dörfle (2012); Robinson et al., (2014); Hjalager et al. (2015); Hjalager, Johansen, & Rasmussen (2015); Tongchaiprasit & Ariyabuddhiphongs (2016); Warde (2016); Pang (2017); Leung & Lin (2018); Zhang & Yu (2018)
			Product aesthetics	Eburne (2010); Hu (2010);
		Hygiene and food safety	Food quality and safety	Birdir & Pearson (2000); Zopiatis (2010); Bosselman (2016); Rebouças et al., (2017); Stluka et al., (2018)
			Cleanliness and healthy	Middleton (2000); Hertzman & Stefanelli (2008); Hertzman & Ackerman (2010); Polak et al., (2015); Doyle (2018)
		Business sense	Cost management	Zopiatis (2010)
			Implement labor cost control	Zopiatis (2010)
			Budgeting	Zopiatis (2010)
			Strategic planning	Harrington (2005); Zopiatis (2010); Nelson et al., (2017); Jha & Bhattacharyya (2018)
			Business skills	Birdir & Pearson (2000); Ladkin (2000); Surlemont et al.,

No	Dimension	Competency	Indicator	Source
				(2005); Harrington & Herzog (2007); Bosselman (2016); Allen & Mac Con Iomaire (2017); Doyle (2018); Laneyrie et al., (2018); Presenza & Petruzzelli (2019)
3	General Competency	Interpersonal	Communication skills	Birdir & Pearson (2000); Harrington (2005); Robinson et al., (2010); Zopiatis (2010)
			Teamwork	Balazs (2002); Mac Con Iomaire (2008); Wang (2013); Savino et al., (2017); Doyle (2018)
			Knowledge of diverse cultures	Zopiatis (2010)
		Leadership	Decision making skills	Birdir and Pearson (2000); Harrington (2005); Zopiatis (2010); Doyle (2018)
			Ethical contact	Zopiatis (2010)
			Emotional control and stability	Murray-Gibbons & Gibbons (2007); Zopiatis (2010)
			Emotional intelligence	Zopiatis (2010); H.-T. Chen & Wang (2019)
			Leadership skills	Allen & Mac Con Iomaire (2017); Haddaji et al. (2017); Swift et al., (2019)
		Managerial	Delegate and organize	Birdir & Pearson (2000); Zopiatis (2010); Allen & Mac Con Iomaire (2017); Doyle (2018)
			Time management	Robinson et al., (2010); Zopiatis (2010); Haddaji et al., (2017)
			Organizational skills	Zopiatis (2010); Doyle (2018)
			Handle staff complaints	Zopiatis (2010)
			Assessing staff	Zopiatis (2010)
			Managerial skills	Allen & Mac Con Iomaire (2017); Laneyrie et al., (2018); Swift et al., (2019)
		Motivational	Ability to motivate others	Balazs (2002); Zopiatis & Constanti (2007); Zopiatis (2010); Allen & Mac Con Iomaire (2017); Doyle (2018)
			Self motivating ability	Zopiatis & Constanti (2007)
			Willpower, obsession, and tenacity	Mac Con Iomaire (2008)

Culinary expertise

Many experts agree that the competencies that need to be mastered by a chef in order to be successful in his career, those related to culinary expertise and professional competence (Ko, 2012). Culinary expertise is the technical expertise that includes knowledge and skills related to the profession of the chef. Similarly, in the study by Birdir and Pearson (2000), the results of this study identified the competency needs of a chef, with the Delphi technique comprising of 33 members of The Research Chef Association revealed that a chef must know the taste and have the ability to distinguish quality levels in food products. The results of this studies also prove that culinary technical expertise has priority interest in development. Other scholars also revealed that chefs must master food processing (Antun & Salazar, 2005; Bosselman, 2016;

Johnston & Phelan, 2016; Zopiatis & Constanti, 2007). For instance, a study conducted by Shyr, Pan, Huang, and Chang (2018) states that a teppanyaki chef must have four competency dimensions consisting of knowledge, technique, affect and attitude.

Zopiatis (2010) stated that this culinary expertise includes knowledge of foodservice operations, knowledge of culinary flavors, and knowledge of recipe and menu development. Knowledge and technical skills in the form of mastery of cooking techniques for important chefs are known as the primary capital of developing culinary products. The chef must follow the development of culinary information based on cultural characteristics and cooking technology. Hu (2010) stated that the chef must also own the mastery of products and culture. Chefs who are unable to keep up with the development of cultural trends and cooking technology will be very quickly left behind and unable to compete. The study conducted by Baldwin (2017) about the transference of Asian hospitality through food explains how Asian cuisine and culture inspires new dishes and menu items for chefs around the world.

According to him, today's chefs use various tools to gather inspiration and gain new knowledge, including culture. But what needs to be highlighted is that a successful chef does not mean a chef who can cook something, but a chef who understands and can create foods that taste high and ultimately favor consumers.

Conceptual (innovation, creativity, and aesthetics)

Food tourism sustainability depends on the creativity of the chef to create exciting culinary products. Maybe many chefs can cook food, but few of them can create innovative and creative food products. This skill is the key to ensuring food tourism sustainability. Food tourism that can innovate food and beverage products every time will be able to last long term in business competition. Another study conducted by Hu (2010), which aims to investigate the core competencies of chefs through in-depth interviews, Delphi, and Analytic Network Process (ANP), revealed that there are seven essential dimensions of chef's core competencies and one of them is creativity and aesthetics. Similarly, scholar (Horng & Hu, 2008; Hu, 2010; Jeou-Shyan & Lee, 2009; Zopiatis, 2010) states that chefs must master artistic culinary creativity.

The future culinary competition is very tight, and chefs need to learn more about how to control the creative process and innovation (Albors-Garrigos et al., 2013; Leung & Lin, 2018; McBride & Flore, 2019). Besides, the courage and ability to innovate for chefs is also significant (Abecassis-Moedas et al. 2016; Hu, 2010; Robinson & Barron, 2007; Zopiatis, 2010). In fact, in their study, Presenza and Petruzzelli (2019) highlighted that innovation became the main driver in the restaurant business relationship. Innovations in cuisine involve the development of new ideas and the incorporation of various aspects of cooking styles such as integrating modern cooking methods in the processing of traditional dishes. Moreover, culinary tourism sustainability is also influenced by efforts to continuously develop culinary products. Periodically, culinary products need to be evaluated and developed, specifically referring to recipes and menus. One of the skills of the chef is being able to conduct culinary product development research (Wan et al., 2017). Tourists reaching boredom in culinary products may be because it does not provide a positive experience of culinary tourism, which can be anticipated by developing recipes and culinary menus by the chef. Of course, the development of recipes and menus is based on SWOT analysis (Strengths, Weaknesses, Opportunities, and Threats) of the market needs to be able to create sustainable culinary products. Processing and serving food is a complex task that requires cooking skills, creativity, innovation, and aesthetics. Because of this, a scientific and conceptual approach can help chefs to work more systematically and

innovatively. The final touch of culinary products, being to beautify dishes, also needs to be mastered by the chef, such as the ability to decorate dishes and how to serve exciting dishes. This capability will provide a positive experience of culinary tourism for tourists and will ultimately offer tourist satisfaction.

Food hygiene and safety

Food quality is not only related to extraordinary taste but also concerns whether the food is safe and healthy for consumers. These two aspects are interrelated, creating excellent and healthy food. This situation is also a challenge for chefs on how to cook delicious culinary dishes that are similarly healthy for consumption. The importance of chefs paying attention to aspects of cleanliness and health during the production process is underlined by several scholars (see Birdir & Pearson, 2000; Bosselman, 2016; Zopiatis, 2010). In discussing cleanliness, attention should be paid the personal hygiene or personal hygiene of the chef, kitchen sanitation, sanitation of kitchen equipment, water sanitation, and others. A chef needs to be aware of the concerns for consumers, starting from how to make consumers satisfied, how they need, and even their health-related to the food they consume. This fact is significant in a restaurant, where unhealthy conditions can affect the quality of food, and can even force a restaurant to close. The study conducted by Allen and Mac Con Iomaire (2017) revealed that there are three top criteria for chef success in Ireland, namely hard work, commitment to quality, and Hazard Analysis and Critical Control Points (HACCP).

Empirically, developing a food safety management system for the food business in the hospitality industry can improve the quality of services, primarily to ensure food security for consumers (Taylor & Taylor, 2008). HACCP is an internationally recognized food safety management system, and its use is recommended in the hospitality industry. HACCP is a way to ensure that the food consumed by customers is safe and healthy. Another study states that good food security knowledge and practice is one of the qualifications of a chef (Rebouças et al., 2017). Thus, the principles of hygiene are part of the competencies considered necessary for the chef's profession and maintaining quality while working in the kitchen area, as this responsibility lies with the chefs.

Business sense

A top chef is also an excellent entrepreneur. He must always think about how to make delicious food while saving costs that can increase profits. Previous studies also proved that business skills are one of the essential skills of a chef (Allen & Mac Con Iomaire, 2017; Birdir & Pearson, 2000; Bosselman, 2016; Ladkin, 2000). Professional chefs are not only encouraged to master how to cook but they must be able to develop business activities for culinary products that they make, such as determining the food cost of culinary products, selling prices of products, to how the product is popular and profitable. Zopiatis (2010), investigated chefs' perceptions of chef competency requirements needed for successful careers in the industry, the study concluded that chefs must have cost management capabilities, cost control, and budgeting.

Top chefs are generally involved in entrepreneurial activities so as to always innovate without limits and maximize their reputation for higher profits (Presenza & Petruzzelli, 2019). The study conducted by Balazs (2002) holds that the key to the success of top chefs in France is directly related to the involvement in entrepreneurial or business activities. Also, a chef must be able to endorse culinary products that he cooks to be known by consumers (Luoh & Lo, 2012). The chef's business skills are needed to increase restaurant income (Surlumont et al., 2005). The importance of business skills of a chef encourages HRD to facilitate business management training activities for chefs (Laneyrie et al., 2018).

Interpersonal

Literature on food and beverage services, especially culinary tourism, highlight the importance of providing customers satisfaction. In this context, developing a chef's image is very important to create excellent service quality. The chefs performance is not only related to cooking skills, but includes excellent interpersonal skills. Building functional interactions with customers and coworkers is one way to create an excellent culinary experience. According to Chen et al. (2016) communication with customers positively influences their culinary experience. Other scholars (Mahfud et al., 2017) state that communication skills are a top priority for working in food and beverage production (kitchen). Zopiatis (2010) describes interpersonal skills as those including communication skills, verbal and writing skills, and knowledge of diverse cultures. Another scholars maintain that one of the interpersonal chefs need to be develop are communication skills (Birdir & Pearson, 2000; Harrington, 2005).

Effective communication skills for chefs are required to be able to facilitate effective medium in conveying information and ideas. The meaning of communication in this context includes both verbal and non-verbal communication. The chef should not only has adequate verbal communication skills but additionally non-verbal communication. A study conducted by Sohn and Lee (2018), on the influence of non-verbal communication by chefs in open kitchens on service quality, revealed that chefs non-verbal communication, including paralanguage, kinesic, proxemic, and physical appearance, was related to service quality. Also, building relationships in complicated work situations in the kitchen is essential. A good team relationship starts from the shared understanding between team members and subsequently forms the commitment of chef members to teamwork (Suhairom et al., 2019). Numerous other studies also revealed that chefs must be able to work together in teams (Balazs, 2002; Doyle, 2018; Mac Con Iomaire, 2008). The organizational structure and tasks in complex kitchens are in dire need of teamwork by the chefs so that work operations can run effectively. Good teamwork can help create timeliness in the presentation of guest food orders. Food processing requires speed and timeliness so that it can be served fresh in front of guests.

Leadership

Leadership practices carried out by chefs in restaurant kitchens are also demonstrated by Wellton et al. (2017). This study revealed that the leadership aspect is needed a head chef to improve their product quality and reputation as a professional chef. This research opined that horizontal leadership practices in the restaurant industry leads to the possibility of a new order for growth and development. In addition, the factors needed to succeed in the culinary industry include professionalism, individual characteristics, leadership skills, management skills, and interactions with work contexts (Allen & Mac Con Iomaire, 2017). Furthermore, according to this study, efforts to strengthen the hotel industry in the future include talent management, guiding future leaders, reducing staff turnover, and curriculum development. Also, chefs play an important role in workplace learning leadership (Cormier-MacBurnie, Doyle, Mombourquette, & Young, 2015). That is, the development of leadership aspects for a chef is vital, and therefore needs to be mastered by the chef.

Managerial

Empirically, the need for crucial competencies to become a successful professional chef has been widely studied by experts. For example, a study conducted by Allen and Mac Con Iomaire (2017) found that the success of chefs in Ireland is influenced by factors such as professionalism, individual characteristics, leadership skills, management skills, and interactions with the work context. Chefs are recognized as culinary professionals who are responsible for maintaining high-quality food services

in hospitality operations. They are therefore required to have planning and management skills (Suhairrom et al., 2019), especially in the position of the head chef or executive chef. Managerial skills are needed by executive chefs to manage operations in the food and beverage division. The study conducted by (Wan et al., 2017), on ten executive chefs and executive sous chefs, shows the importance of mastering management skills for the chef's profession. Similarly, Harrington (2005) considers the chef to be the CEO who plans strategic business so that the culinary industry is successful.

Motivational

The work atmosphere in the kitchen experienced by chefs is full of busyness, pressure, and a large workload. General characteristics of culinary workplaces include long working hours (Mac Con Iomaire, 2008), high-stress levels (Mac Con Iomaire, 2008; Wang et al., 2011), low compensation and limited opportunities for progress in the industry (Jauhari, 2006). Therefore, a chef is required to have a good personality, such as being able to motivate himself and others. A high workload can lead to stress, and as such, the chef must be able to motivate himself always to work productively (Zopiatis & Constanti, 2007). In theory, motivation is a factor that drives a chef towards better work performance. Other meanings of motivation refer to aspects that encourage, direct, and choose behavior towards specific actions or goals. Also, working within a team in the kitchen requires the chef to be able to motivate the team members to work (Allen & Mac Con Iomaire, 2017; Balazs, 2002; Zopiatis, 2010; Zopiatis & Constanti, 2007). Problems experienced by the kitchen staff can also include discipline, cramped conditions, being without fresh air and the weather being too hot, especially in summer (Pratten, 2003). The ability to influence other people by motivating other kitchen staff is crucial to create a productive performance for chefs and other kitchen team members.

CONCLUSION

Competence is an essential factor that has a tremendous impact on the sustainability of an individual's career, especially in the culinary field. The results of this study show the criteria for successful chefs to support the development of food tourism. Chef's competency is divided into three types, namely functional competencies, core competencies, and general competencies. The chef's functional competency is culinary expertise that includes cooking skills, taste and food knowledge, and service tightening. Core competencies include conceptual ability, cleanliness, and business sense. Meanwhile, general competence consists of interpersonal, leadership, managerial, and motivational skills. This chef's competence is as a guide for culinary educators and trainers for sustainable career development in the culinary profession.

Acknowledgments

This paper is part of a dissertation project, so we would like to thank the Yogyakarta State University Postgraduate Program for approving the selection of this dissertation topic. Also, I would like to thank the Ministry of Research, Technology and Higher Education of the Republic of Indonesia for supporting the funding of this research.

REFERENCES

- Abecassis-Moedas, C., Sguera, F., & Ettlie, J. E. (2016). Observe, innovate, succeed: A learning perspective on innovation and the performance of entrepreneurial chefs. *Journal of Business Research*, 69(8), 2840–2848. <https://doi.org/https://doi.org/10.1016/j.jbusres.2015.12.053>.
- Albors-Garrigos, J., Barreto, V., García-Segovia, P., Martínez-Monzó, J., & Hervás-Oliver, J. L. (2013). Creativity and Innovation Patterns of Haute Cuisine Chefs. *Journal of Culinary Science & Technology*, 11(1), 19–35. <https://doi.org/10.1080/15428052.2012.728978>.

- Allen, H., & Mac Con Iomaire, M. (2017). Secrets of a head chef: Exploring factors influencing success in Irish kitchens. *Journal of Culinary Science and Technology*, 15(3), 187–222. <https://doi.org/10.1080/15428052.2016.1225538>.
- Antun, J. M., & Salazar, J. (2005). The impact of learning transfer outcomes on employed culinary arts graduates' perceptions of career success. *Journal of Culinary Science & Technology*, 4(1), 75–87. https://doi.org/doi:10.1300/J385v04n01_09.
- Balazs, K. (2002). Take one entrepreneur: The recipe for success of France's great chefs. *European Management Journal*, 20(3), 247–259. [https://doi.org/doi:10.1016/S0263-2373\(02\)00040-3](https://doi.org/doi:10.1016/S0263-2373(02)00040-3).
- Baldwin, W. (2017). The transference of Asian hospitality through food: Chef's inspirations taken from Asian cuisines to capture the essence of Asian culture and hospitality. *International Journal of Gastronomy and Food Science*, 8(C), 7–13. <https://doi.org/10.1016/j.ijgfs.2017.01.002>.
- Baldwin, W. (2018). Chef's sabbatical: An analysis of chef's gastronomic research through culinary tourism. *International Journal of Gastronomy and Food Science*, 13, 65–72. <https://doi.org/https://doi.org/10.1016/j.ijgfs.2018.05.006>.
- Bharwani, S., Mathews, D., & Ghura, A. S. (2019). Business model innovation in the Indian hospitality industry. *Worldwide Hospitality and Tourism Themes*, 11(4), 362–377. <https://doi.org/10.1108/WHATT-04-2019-0018>.
- Birdir, K., & Pearson, T. E. (2000). Research chefs' competencies: A Delphi approach. *International Journal of Contemporary Hospitality Management*, 12(3), 205–209. <https://doi.org/10.1108/09596110010309989>.
- Bosselman, R. (2016). An Evaluation of the Research Chefs Association's Bachelor of Science in Culinology® Core Competencies AU - Cheng, Michael. *Journal of Hospitality & Tourism Education*, 28(3), 127–141. <https://doi.org/10.1080/10963758.2016.1189831>.
- Chen, A., Peng, N., & Hung, K. (2016). Chef image's influence on tourists' dining experiences. *Annals of Tourism Research*, 56, 154–158. <https://doi.org/https://doi.org/10.1016/j.annals.2015.11.005>.
- Chuang, N., Yin, D., & Dellmann-Jenkins, M. (2009). Intrinsic and extrinsic factors impacting casino hotel chefs' job satisfaction. *International Journal of Contemporary Hospitality Management*, 21(3), 323–340. <https://doi.org/10.1108/09596110910948323>.
- Cormier-MacBurnie, P., Doyle, W., Mombourquette, P., & Young, J. D. (2015). Canadian chefs' workplace learning. *European Journal of Training and Development*, 39(6), 522–537. <https://doi.org/10.1108/EJTD-01-2015-0003>.
- Cousins, J., O'Gorman, K., & Stierand, M. (2010). Molecular gastronomy: cuisine innovation or modern day alchemy? *International Journal of Contemporary Hospitality Management*, 22(3), 399–415. <https://doi.org/10.1108/09596111011035972>.
- Doyle, A. (2018). Chef skills list and examples. Retrieved August 24, 2018, from <https://www.thebalancecareers.com/chef-skills-list-2062369>.
- Dumitrescu, C., Drăghicescu, L., Olteanu, R. L., & Suduc, A.-M. (2014). Key Competences for Sustainable Development – Aspects Related with SUSTAIN Project Activity. *Procedia - Social and Behavioral Sciences*, 141, 1101–1105. <https://doi.org/https://doi.org/10.1016/j.sbspro.2014.05.185>.
- Eburne, J. P. (2010). The Chef Drive: Cooking Beyond the Pleasure Principle. *Contemporary French and Francophone Studies*, 14(2), 169–177. <https://doi.org/10.1080/17409291003644909>.
- Haddaji, M., Albors-Garrigós, J., & García-Segovia, P. (2017). Women chefs' experience: Kitchen barriers and success factors. *International Journal of Gastronomy and Food Science*, 9, 49–54. <https://doi.org/https://doi.org/10.1016/j.ijgfs.2017.06.004>.
- Hall, C. M., & Sharples, L. (2003). The consumption of experiences or the experience of consumption? An introduction to the tourism of taste. In C. M. Hall, L. Sharples, R. Mitchell, N. Macionis, & B. Cambourne (Eds.), *Food tourism around the world: Development, management and markets* (pp. 1–24). Oxford: Butterworth-Heinemann.
- Harrington, R., & Herzog, C. (2007). Chef John Folse: A Case Study of Vision, Leadership & Sustainability. *Journal of Hospitality & Tourism Education*, 19(3), 5–10. <https://doi.org/10.1080/10963758.2007.10696892>.
- Harrington, R. J. (2005). Chef as CEO: An analogy and teaching tool. *Journal of Culinary Science and Technology*, 4(1), 39–52. https://doi.org/doi:10.1300/J385v04n01_06.
- Hegarty, J. (2008). What is the Role of the Chef in Contemporary Society? *Journal of Culinary Science & Technology*, 6(1), 1–4. <https://doi.org/10.1080/15428050701884113>.
- Hegarty, J., & Antun, J. (2010). Is the Chemical Chef Dividing Culinary Arts and Gastronomy? *Journal of Culinary Science & Technology*, 8(2–3), 73–76. <https://doi.org/10.1080/15428052.2010.511095>.
- Hertzman, J., & Ackerman, R. (2010). Evaluating quality in associate degree culinary arts programs. *Quality Assurance in Education*, 18(3), 209–226. <https://doi.org/10.1108/09684881011058650>.
- Hertzman, J., & Stefanelli, J. M. (2008). Developing Quality Indicators for Associate Degree Culinary Arts Programs: A Survey of Educators and Industry Chefs. *Journal of Quality Assurance in Hospitality & Tourism*, 9(2), 135–158. <https://doi.org/10.1080/15280080802235466>.
- Hjalager, A.-M., Johansen, P. H., & Rasmussen, B. (2015). Informing regional food innovation through lead user experiments. *British Food Journal*, 117(11), 2706–2723. <https://doi.org/10.1108/BJFJ-03-2015-0098>.

- Hoholm, T., & Strønen, F. H. (2011). Innovation, strategy and identity: a case study from the food industry. *European Journal of Innovation Management*, 14(3), 345–363. <https://doi.org/10.1108/14601061111148834>.
- Horng, J. S., & Hu, M. L. (2008). The mystery in the kitchen: the developmental process of culinary creativity. *Creativity Research Journal*, 20(2), 221–230.
- Hsi-Tien, C., & Wang, C.-H. (2019). Incivility, satisfaction and turnover intention of tourist hotel chefs. *International Journal of Contemporary Hospitality Management*, 31(5), 2034–2053. <https://doi.org/10.1108/IJCHM-02-2018-0164>.
- Hu, M.-L. M. (2010). Developing a core competency model of innovative culinary development. *International Journal of Hospitality Management*, 29(4), 582–590. <https://doi.org/https://doi.org/10.1016/j.ijhm.2009.10.024>.
- Ian, Y. (2016). The future of food tourism. *Journal of Tourism Futures*, 2(1), 95–98. <https://doi.org/10.1108/JTF-12-2015-0051>.
- Jauhari, V. (2006). Competencies for A Career in The Hospitality Industry: An Indian Perspective. *International Journal of Contemporary Hospitality Management*, 18(2), 123–134. <https://doi.org/10.1108/09596110610646673>.
- Jeou-Shyan, H., & Lee, Y. (2009). What environmental factors influence creative culinary studies? *International Journal of Contemporary Hospitality Management*, 21(1), 100–117. <https://doi.org/10.1108/09596110910930214>.
- Jha, S., & Bhattacharyya, S. S. (2018). Online restaurant entrepreneurship: the story of Holachef in an increasingly digitalized India. *Emerald Emerging Markets Case Studies*, 8(1), 1–17. <https://doi.org/10.1108/EEMCS-03-2017-0040>.
- Johnston, N. E., & Phelan, K. V. (2016). Assessing objective and subjective factors of culinary career success: Exploring the influence of industry certifications. *Journal of Culinary Science & Technology*, 14(1), 36–58. <https://doi.org/doi:10.1080/15428052.2015.1080641>.
- Jones, G. S. (2011). The Difference Between a Cook and a Chef. Retrieved May 15, 2019, from <https://www.reluctantgourmet.com/difference-cook-chef/>.
- Kalebos, F. (2016). Faktor-faktor yang mempengaruhi kepuasan wisatawan yang berkunjung ke daerah wisata kepulauan. *Jurnal Riset Bisnis Dan Manajemen*, 4(3), 489–502.
- Ko, W.-H. (2012). The relationships among professional competence, job satisfaction and career development confidence for chefs in Taiwan. *International Journal of Hospitality Management*, 31(3), 1004–1011. <https://doi.org/https://doi.org/10.1016/j.ijhm.2011.12.004>.
- Kristanti, M., Jokom, R., Wijaya, S., & Widjaja, D. C. (2018). Culinary experience towards behavioral of domestic tourists in Solo and Bandung, Indonesia. *Kinerja*, 22(2), 186–200.
- Ladkin, A. (2000). Vocational education and food and beverage experience: issues for career development. *International Journal of Contemporary Hospitality Management*, 12(4), 226–233. <https://doi.org/10.1108/09596110010330723>.
- Laneyrie, E., Landry, A., & Rouat, S. (2018). Représentations des chefs cuisiniers quant à leur activité de management: entre performance et prévention des risques. *Psychologie Du Travail et Des Organisations*. <https://doi.org/https://doi.org/10.1016/j.pto.2018.11.001>.
- Leung, V. T. Y., & Lin, P. M. C. (2018). Exogenous factors of the creative process and performance in the culinary profession. *International Journal of Hospitality Management*, 69, 56–64. <https://doi.org/https://doi.org/10.1016/j.ijhm.2017.10.007>.
- Luoh, H.-F., & Lo, P.-C. (2012). The Effectiveness of Chef Endorsement in Restaurant Print Advertising: Do Respondents' Gender Stereotypes or Genders Matter? *Asia Pacific Journal of Tourism Research*, 17(4), 416–431. <https://doi.org/10.1080/10941665.2011.627354>.
- Mac Con Iomaire, M. (2008). Understanding the Heat—Mentoring: A Model for Nurturing Culinary Talent AU - Mac Con Iomaire, Máirtín. *Journal of Culinary Science & Technology*, 6(1), 43–62. <https://doi.org/10.1080/15428050701884196>.
- Mahfud, T., Kusuma, B. J., & Mulyani, Y. (2017). Soft skill competency map for the apprenticeship programme in the Indonesian balikan hospitality industry. *Journal of Technical Education and Training*, 9(2).
- McBride, A. E., & Flore, R. (2019). The changing role of the chef: A dialogue. *International Journal of Gastronomy and Food Science*, 17, 100157. <https://doi.org/https://doi.org/10.1016/j.ijgfs.2019.100157>.
- Middleton, G. (2000). A preliminary study of chefs' attitudes and knowledge of healthy eating in Edinburgh's restaurants. *International Journal of Hospitality Management*, 19(4), 399–412. [https://doi.org/https://doi.org/10.1016/S0278-4319\(00\)00018-9](https://doi.org/https://doi.org/10.1016/S0278-4319(00)00018-9).
- Müller, K. F., VanLeeuwen, D., Mandabach, K., & Harrington, R. J. (2009). The effectiveness of culinary curricula: a case study. *International Journal of Contemporary Hospitality Management*, 21(2), 167–178. <https://doi.org/10.1108/09596110910935660>.
- Murray-Gibbons, R., & Gibbons, C. (2007). Occupational stress in the chef profession. *International Journal of Contemporary Hospitality Management*, 19(1), 32–42. <https://doi.org/10.1108/09596110710724143>.
- Nelson, P., Beckie, M. A., & Krogman, N. T. (2017). The “Locavore” Chef in Alberta: A Situated Social Practice Analysis. *Food, Culture & Society*, 20(3), 503–524. <https://doi.org/10.1080/15528014.2017.1288798>.

- Ottenbacher, M., & Harrington, R. J. (2007). The innovation development process of Michelin-starred chefs. *International Journal of Contemporary Hospitality Management*, 19(6), 444–460. <https://doi.org/10.1108/09596110710775110>.
- Palmer, C., Cooper, J., & Burns, P. (2010). Culture, identity, and belonging in the “culinary underbelly.” *International Journal of Culture, Tourism and Hospitality Research*, 4(4), 311–326. <https://doi.org/10.1108/17506181011081497>.
- Pang, L. (2017). The training and creativity of professional chefs: Stoking the imagination in global gastronomic discourse. *Appetite*, 119, 48–53. <https://doi.org/https://doi.org/10.1016/j.appet.2017.08.014>.
- Paulsson, L. (2014). *Ekonomiska och sysselsättningsmässiga effekter av turismen i Skåne 2013*. Stockholm: Resurs TEM.
- Polak, R., Sforzo, G. A., Dill, D., Phillips, E. M., & Moore, M. (2015). Credentialed Chefs as Certified Wellness Coaches: Call for Action. *Eating Behaviors*, 19, 65–67. <https://doi.org/https://doi.org/10.1016/j.eatbeh.2015.06.016>.
- Pratten, J. D. (2003). What makes a great chef? *British Food Journal*, 105(7), 454–459. <https://doi.org/10.1108/00070700310497255>.
- Presenza, A., & Petruzzelli, A. M. (2019). Investigating business model innovation in Haute Cuisine. Role and behavior of chef-entrepreneurs. *International Journal of Hospitality Management*, 82, 101–111. <https://doi.org/https://doi.org/10.1016/j.ijhm.2019.03.027>.
- Rebouças, L. T., Santiago, L. B., Martins, L. S., Rios Menezes, A. C., Araújo, M. da P. N., & Almeida, R. C. de C. (2017). Food safety knowledge and practices of food handlers, head chefs and managers in hotels' restaurants of Salvador, Brazil. *Food Control*, 73, 372–381. <https://doi.org/https://doi.org/10.1016/j.foodcont.2016.08.026>.
- Robinson, R. N. S., Arcodia, C. V., Tian, C., & Charlton, P. (2010). Cookery-related employment vacancy advertisements and skills shortages. *International Journal of Contemporary Hospitality Management*, 22(4), 483–499. <https://doi.org/10.1108/09596111011042703>.
- Robinson, R. N. S., & Barron, P. E. (2007). Developing a framework for understanding the impact of deskilling and standardisation on the turnover and attrition of chefs. *International Journal of Hospitality Management*, 26(4), 913–926. <https://doi.org/https://doi.org/10.1016/j.ijhm.2006.10.002>.
- Robinson, R. N. S., & Beesley, L. G. (2010). Linkages between creativity and intention to quit: An occupational study of chefs. *Tourism Management*, 31(6), 765–776. <https://doi.org/https://doi.org/10.1016/j.tourman.2009.08.003>.
- Robinson, R. N. S., Solnet, D. J., & Breakey, N. (2014). A phenomenological approach to hospitality management research: Chefs' occupational commitment. *International Journal of Hospitality Management*, 43, 65–75. <https://doi.org/https://doi.org/10.1016/j.ijhm.2014.08.004>.
- Savino, T., Petruzzelli, A. M., & Albino, V. (2017). Teams and lead creators in cultural and creative industries: evidence from the Italian haute cuisine. *Journal of Knowledge Management*, 21(3), 607–622. <https://doi.org/10.1108/JKM-09-2016-0381>.
- Sharma, S., & Sharma, R. (2019). Culinary skills: the spine of the Indian hospitality industry. *Worldwide Hospitality and Tourism Themes*, 11(1), 25–36. <https://doi.org/10.1108/WHATT-10-2018-0061>.
- Shyr, W.-J., Pan, Y.-L., Huang, C.-C., & Chang, S.-H. (2018). Development of competences for Teppanyaki chefs in food and beverage education. *British Food Journal*, 120(8), 1696–1707. <https://doi.org/10.1108/BFJ-02-2018-0122>.
- Sohn, E.-M., & Lee, K.-W. (2018). The effect of chefs' nonverbal communication in open kitchens on service quality. *Journal of Foodservice Business Research*, 21(5), 483–492. <https://doi.org/10.1080/15378020.2018.1459125>.
- Stierand, M. B., & Dörfler, V. (2012). Reflecting on a phenomenological study of creativity and innovation in haute cuisine. *International Journal of Contemporary Hospitality Management*, 24(6), 946–957. <https://doi.org/10.1108/09596111211247254>.
- Stluka, S., Wells, K., & McCormack, L. (2018). Power Chef Challenge: A Middle School Youth Cooking Curriculum. *Journal of the Academy of Nutrition and Dietetics*, 118(9, Supplement), A65. <https://doi.org/https://doi.org/10.1016/j.jand.2018.06.025>.
- Suhairrom, N., Musta'amal, A. H., Mohd Amin, N. F., Kamin, Y., & Abdul Wahid, N. H. (2019). Quality culinary workforce competencies for sustainable career development among culinary professionals. *International Journal of Hospitality Management*, 81, 205–220. <https://doi.org/https://doi.org/10.1016/j.ijhm.2019.04.010>.
- Surlemont, B., Chantrain, D., Nlemvo, F., & Johnson, C. (2005). Revenue models in haute cuisine: an exploratory analysis. *International Journal of Contemporary Hospitality Management*, 17(4), 286–301. <https://doi.org/10.1108/09596110510597561>.
- Swift, D., Malek, K., & Swift, A. (2019). The Differences Between ACF Professional Chefs and Chef Educators: Concern for Task Versus Concern for People. *Journal of Hospitality & Tourism Education*, 31(2), 87–98. <https://doi.org/10.1080/10963758.2018.1485496>.
- Taylor, E., & Taylor, J. (2008). A new method of HACCP for hospitality: from concept to product. *International Journal of Contemporary Hospitality Management*, 20(5), 524–541. <https://doi.org/10.1108/09596110810881454>.

- Tongchaiprasit, P., & Ariyabuddhiphongs, V. (2016). Creativity and turnover intention among hotel chefs: The mediating effects of job satisfaction and job stress. *International Journal of Hospitality Management*, 55, 33–40. <https://doi.org/https://doi.org/10.1016/j.ijhm.2016.02.009>.
- Tuparova, D., Kaseva, M., & Tuparov, G. (2014). Development of Key Competences through ICT in Primary School. *Procedia - Social and Behavioral Sciences*, 116, 2952–2956. <https://doi.org/https://doi.org/10.1016/j.sbspro.2014.01.686>.
- Ulloa, A. M. (2019). The chef and the flavorist: reflections on the value of sensory expertise. *Food, Culture & Society*, 22(2), 186–202. <https://doi.org/10.1080/15528014.2019.1573042>.
- Verhaeghe, G., Vanhoof, J., Valcke, M., & Van Petegem, P. (2011). Effects of support of the use of school feedback. *Pedagogische Studien*, 88(2), 90–106. Retrieved from <http://www.ijrvet.net/index.php/IJRVET/article/view/259/76>.
- Wan, T.-H., Hsu, Y.-S., Wong, J.-Y., & Liu, S.-H. (2017). Sustainable international tourist hotels: the role of the executive chef. *International Journal of Contemporary Hospitality Management*, 29(7), 1873–1891. <https://doi.org/10.1108/IJCHM-08-2015-0406>.
- Wang, Y.-F., Horng, J.-S., Cheng, S.-Y. (Sophie), & Killman, L. (2011). Factors influencing food and beverage employees' career success: A contextual perspective. *International Journal of Hospitality Management*, 30(4), 997–1007. <https://doi.org/https://doi.org/10.1016/j.ijhm.2011.03.005>.
- Warde, A. (2016). At the Chef's Table: Culinary Creativity in Elite Restaurants. *Food, Culture & Society*, 19(3), 630–632. <https://doi.org/10.1080/15528014.2016.1209292>.
- Wellton, L., Jonsson, I. M., & Svingstedt, A. (2017). “Just trained to be a chef, not a leader”: A study of head chef practices. *International Journal of Hospitality & Tourism Administration*, 1–23. <https://doi.org/10.1080/15256480.2017.1397584>.
- Wolfswinkel, J., Furtmueller-Ettinger, E., & Wilderom, C. P. M. (2013). Using grounded theory as a method for rigorously reviewing literature. *European Journal of Information Systems*, 22, 45–55. <https://doi.org/https://doi.org/10.1057/ejis.2011.51>.
- Yang, B., & Mattila, A. S. (2019). “Chef recommended” or “most popular”? Cultural differences in customer preference for recommendation labels. *International Journal of Hospitality Management*, 102390. <https://doi.org/https://doi.org/10.1016/j.ijhm.2019.102390>.
- Yao-Fen, W. (2013). Constructing career competency model of hospitality industry employees for career success. *International Journal of Contemporary Hospitality Management*, 25(7), 994–1016. <https://doi.org/10.1108/IJCHM-07-2012-0106>.
- Zhang, Y., & Yu, X. (2018). Urban tourism and the politic of creative class: a study of the chefs in Macao. *International Journal of Tourism Sciences*, 18(2), 139–151. <https://doi.org/10.1080/15980634.2018.1471880>.
- Zopiatis, A. (2010). Is it art or science? Chef's competencies for success. *International Journal of Hospitality Management*, 29(3), 459–467. <https://doi.org/10.1016/j.ijhm.2009.12.003>.
- Zopiatis, A., & Constanti, P. (2007). “And never the twain shall meet” Investigating the hospitality industry-education relationship in Cyprus. *Education + Training*, 49(5), 391–407. <https://doi.org/10.1108/00400910710762959>.
- *** ASEAN. (2013). *ASEAN Mutual Recognition Arrangement (MRA) on Tourism Professionals Handbook*. Jakarta: ASEAN.
- *** Culinary Institute of America. (2012). *The professional chef*. New York: John Wiley and Sons.
- *** Expedia. (2016). Ældre er mere eventyrlystne. Retrieved from Press release website: <http://www.mynewsdesk.com/dk/expedia-denmark/pressreleases/aeldre-er-mere-eventyrlystne-1442638>.
- *** Oxford Dictionary Online. (2019). Definition of chef in English. Retrieved May 15, 2019, from <https://en.oxforddictionaries.com/definition/chef>.
- *** Wikipedia. (2019). Cook (profession). Retrieved May 15, 2019, from [https://en.wikipedia.org/wiki/Cook_\(profession\)](https://en.wikipedia.org/wiki/Cook_(profession)).

Submitted:
31.07.2019

Revised:
11.11.2019

Accepted and published online
13.11.2019

RELIGIOUS PLACES AS TOOLS FOR ADVENTURE TOURISM DEVELOPMENT IN TIGRAY, ETHIOPIA

Gebreslassie DANIEL ALEMSHET*

Aksum University, Ethiopia,
e-mail: daniiofaxum@gmail.com

Gebreyesus TEKLEBRHAN LEGESE

Aksum University, Ethiopia,
e-mail: teklebrhan2112@gmail.com

Citation: Daniel, Alemshet, G. &, Teklebrhan, Legese, G. (2019). RELIGIOUS PLACES AS TOOLS FOR ADVENTURE TOURISM DEVELOPMENT IN TIGRAY, ETHIOPIA. *GeoJournal of Tourism and Geosites*, 26(3), 10072–1091. <https://doi.org/10.30892/gtg.26330-418>

Abstract: The main objective of this article was to assess the potentials religious places of Abune Selama, Abune Yemata, Mariam Qorqor, and Abune Daniel and Abune Aregawi as tools for adventure development in Tigray, Ethiopia. It used the explorative research design. Data were collected from interviews, observations, photos, and document analysis. The data collected were processed, analyzed and interpreted through exploratory technique. The result shows that the monasteries have abundant adventure tourism products and activities like hiking, climbing, trekking and magnificent scenic views. Hence, the concerned bodies should develop adventure tourism products so as to enhance the overall community benefits.

Key words: religious places, tools, adventure, tourism development, monasteries

* * * * *

BACKGROUND OF THE STUDY

All forms of tourism such as eco-tourism, religious tourism, sport tourism, medicine tourism and others are rapidly growing as it is the case with adventure tourism (UNWTO, 2014). The travel and tourism industry continues to make a real difference to the lives of millions of people by driving growth, creating jobs, reducing poverty and fostering development and tolerance (Wanfei et al., 2015; WTTC, 2018). Increasingly, countries in all stages of economic development are prioritizing adventure tourism for market growth, because they recognize it's ecological, cultural, and economic value as it protects the important "lungs of the earth", and gives people a reason to stay rural and be proud of their cultures (UNWTO, 2014). Tourism like activity in Ethiopia dates back to the pre-Axumite period when the first illustrated travel guides to Ethiopia can be found in the friezes of the pyramids of ancient Egypt (Yabibal, 2010). In the history of Ethiopia, tourism was made part of economic development during the 1960s when it was included

* Corresponding author

in the Second Five Years Plan, 1963-1967 (Ayalew, 2010). Since then successive governments have tried to use the sector as a means of economic development. However, little is achieved due to the limited tourism infrastructure development and political instability (Yabibal, 2010). In terms of tourism resources, Ethiopia is very rich as it is the home of twelve world heritages registered by UNESCO. In addition to these, the country has numerous under-utilized natural and cultural tourism resources (Yabibal, 2010). Since ancient times, traveling for fervor and religious devotion purposes had been present in humanity (Mason, 2016). In this way, religious tourism starts from the moment people begin a journey due to a question of belief (Ayalew, 2010).

In the Ethiopian case, the people have a long history of traveling for religion purposes before and after the major religions introduced: Judaism, Christianity and Islam (*Ibid*). The tangible and intangible heritages associated with these three religions and others are among the main sources of travel to Ethiopia. However, the potential resources are not yet studied and used for tourism purpose (Erimias, 2014).

STATEMENT OF THE PROBLEM

Tigray, one of the regional states of Ethiopia, is considered as the “cradle of human civilization” just to indicate the numerous natural and cultural tourism heritages found in its sovereigns. All of the three major religions- Judaism, Christianity and Islam- were introduced to Ethiopia in ancient time via this region. Because of this, the region owns long and attractive tangible and intangible heritages associated with these religions. Tigray regional state owns the Ark of Covenant, first constructed church, the first monastery church, the monastery of Abune Selama Ksatie Brhan, the first bishop in Ethiopian history, the monasteries of nine Saints, came to Tigray in 5th century AD, more than 120 rock hewn churches, number of ancient churches and monasteries, numerous religious books, crosses and other heritages used for religious purposes. They are sources of religious tourism development but not to the appropriate and desired level so far.

Therefore, the main objective of this article was to assess the potentials of mountain based adventure religious tourism for tourism development in Tigray on the exemplary ancient monasteries-Abune Selama, Abune Yemata, Mariam Qorqor and Abune Daniel, and Debre Damo- monasteries. They are not well documented, poor infrastructural development, lack of promotion, lack of tourist accommodation centers in the areas and less attention given to tourism sector are among the few reasons. Thus, the article tried to reveal their potentials for adventure tourism development.

GENERAL OBJECTIVE OF THE STUDY

The main objective of this study was to assess the potentials of religious places of Abune Selama, Abune Yemata, Mariam Qorqor and Abune Daniel and Abune Aregawi (Debre Damo) as tools for adventure tourism development in Tigray, Ethiopia.

Specific Objectives

The specific objectives of the study are:

- To explore the adventure religious tourism potentials of the religious places
- To indicate the potential benefits that the adventure religious tourism products contributes to visitors and to the host communities.

REVIEW OF RELATED LITERATURE

Religious Tourism in Ethiopia

Ethiopia was made serious and continual commerce relationships with the then ancient states like with Greek Romans, Israel, Egypt and Yemen through the Red Sea and Mediterranean Sea. Because of this, the country didn't take time to accept the three monotheistic religions (Sergew, 1972; Tadese, 1972). Before the acceptance of

Christianity as official religion people, were worshiped in different gods, and travel from place to place to worship different gods (Ayalew, 2010). Ethiopians accepted Christianity as the official religion in 330 A.D. during King Ezana, the first African king to accept Christianity as the official religion of his empire (Sergew, 1972).

But before it is difficult to say there were no individual believers before 330 A.D (*Ibid*). The first Ethiopian bishop is called Frumentius, appointed by Patriarch Athanasius of Alexandria in Egypt (Taddesse, 1972). In Ethiopians *Abba*, a title, Frumentius called Abune Selama Ksate Birhan, which literary means father of peace, the revealer of light (*Ibid*). Abune Selama Ksate Birhan served as the father of all Christian's followers and expanded Christianity to all directions of the country. Christianity is also expanded rapidly in Ethiopia with the advent of Syrian missionaries to Ethiopia at the end of 5th century called, the *Tsa'ate Qudsan* or The Nine Saints, who came from the Mediterranean world to escape the religion conflict in their home (Yolande, 1972). The Nine Saints established education centers, expanded Christianity to the non-believers, converted Bible from Greek to Ge'ez Language, built many churches and probably started the first monastic life in Ethiopia (William, 1981).

With the exception of very few Ethiopian rulers, the successive Asumite rulers expanded Christianity to non-believers, built many churches and monasteries, and religious education centers through peacefully and forcefully (Taddesse, 1972). All the churches and monasteries have unique tangible heritages such as crosses, the buildings, religious books, the ark/replica of covenants, dress and drums and intangible heritages such as festivals, gatherings and ceremonies. Most of the ancient and medieval churches and monasteries were built in a very inaccessible area for political and religious reasons. As Sergew (1972) and Tadesse (1972) explained that the churches and monasteries were built in difficult and inaccessible areas for the reasons of the hermits want to live far away from residents to have conducive environment for praying, to escape from enemies and to represent as the Jesus Christ was born in a forest and inaccessible area. Most of the religious tourism sites in Ethiopia belong to the Ethiopian Orthodox Church. However, few are recognized and visited by both international and domestic tourists. Whereas many of them are not well recognized and still not visited (Erimias, 2014). Despite its rich treasures, very few different foreign writers, diplomats, believers, and those who want to learn the culture of the people come to see the heritages and history of Tigray starting to the ancient times (Georg, 1970).

The Concept of Adventure Tourism

Originally adventure was associated with the exploration of faraway places to search for new land, wealth, and scientific advance (Weber, 2001). Later in the late 19th century, the reason for adventure shifted away from the search for land and wealth to reasons related to an individual's own personal desire (Ewert, 1989 cited in Weber, 2001). Until the end of the 19th century, outdoor adventure recreation did not have the widespread acceptance as it got in the following decades are an outdoor adventure involved around interaction with the natural environment, that requires an element of risk, that often is exposed to physical danger (*Ibid*). Based on these factors, adventure travel has been defined as: "Any number of leisure pursuits which provide exposure to physical danger" (Meier, 1978). Humans have been engaged in adventurous travels for hundreds of years. But commercial adventure travel as known today, where professional guides are hired to provide technical support and equipment, is a relatively new phenomenon (UNWTO, 2014). Adventure tourism is a vibrant, dynamic and fast-changing sector where new variants are added to the experience.

Within adventure tourism, there are two main categories of adventure activities, soft adventure and hard adventure (UNWTO, 2014). Soft adventure travel is travel to

novel or exotic locations (Goodnow, 2005; UNWTO, 2014). The activities undertaken during the trip are low risk and low-intensity activities. Soft adventure travel is a more luxury form of traveling. These types of tourists like to enjoy high-quality food, stay in quality lodging and use quality transportation (Goodnow, 2005).

Activities such as bird watching, fishing, hiking, horseback riding, sailing and scuba diving are examples of soft adventure activities (UNWTO, 2014).

Hard adventure travel is a travel to new or exotic destinations. The activities are at a higher level of risk, that requires greater skills and a higher intensity level of activities (Goodnow, 2005). When it comes to accommodation, hard adventure travelers are looking for more rustic types of accommodation such as rustic lodges, tents or basic hotels. The food consumed during the trip is generally the traditional food of the region (ibid). Caving, climbing and trekking are examples of hard adventure activities (UNWTO, 2014). The excitement causes a feeling of interest and enthusiasm for undertaking an adventure. Whereas the daring element of an adventure indicates that tourists during an adventure expose themselves to danger (Webster, 2017).

Adventurous Features of Rock-Hewn Churches and Monasteries in Tigray

In Tigray region, there are above 120 rock-hewn churches and a number of historical monasteries. Most of the rock-hewn churches are monolithic, semi-monolithic and cave churches either carved out of existing caves or out of the cliffs or still attached to their host rock. The monasteries and rock-hewn churches are found hidden away high up on cliffs and inside the sides of hills and mountains (Georg, 1970). As can be observed, anyone to reach the monasteries requires strength, commitment and willingness to learn as some of them are demonstrated in the figure below (Figure 1). To mention the name of the monasteries from left to right are Abune Yohani, Wukro Mariam Check Slassie, Dengelat and Teklahymanot Tamba.



Figure 1. Some of the physical features of Tigray rock-hewn monasteries

Though it is little known of their actual origins, it is believed that most of the rock-hewn churches and monasteries of Tigray were created from the 4th century of the Axumite period and continues to the 15th century of the medieval period (Tadesse, 1972; Ruth Plant, 1985). Most rock-hewn churches and monasteries consist of or have three rooms: these are an ante chamber or chanting room, a sanctuary, and a “Holy of Holies,” the last of which only the high priest may enter. The Holy of Holies keeps the original rests in the church/monastery of Axum, the famed Biblical Ark of the Covenant (Sergew, 1972). All the monasteries and rock-hewn churches have very historic tangible and intangible heritages.

Motivation of Adventure Tourists

The motivations for adventure tourists could be the quest for self-awareness, self-actualization, self-discovery and achievement (Sung et al., 1997). Adventure travelers are motivated to participate in adventure travel as they have a need for new learning (Schneider & Vogt, 2012). Furthermore, it explained that wanting to learn about other places, people, and cultures as well as to get unique experiences forced peoples to engage in adventure tourism (Schneider & Vogt, 2012).

The diversified activity within an adventure tourism destination also attracts people to participate in adventure travel (Ewert, 1989; Sung, 2004).

METHODS AND MATERIALS

Description of the Study Site Areas

All the selected sites are located in Tigray Regional State of Ethiopia, but, they are found in different woredas, equivalent to districts, of the region. The monasteries are rock-hewn churches except for Debre Damo, it is also highly attached to the massive rock. Debre Damo monastery is considered as the first monastery in Ethiopia found in Eastern zone, Gula Mukada woreda. The three, Mariam Qorqor and Abune Daniel, and Abune Yemata are found in Eastern Zone of Hawzien woreda in the Gheralta's mountain. The last, Abune Selama monastery is found in Central Zone Qola Tembien woreda. All these historic monasteries can be visited via one route: with either itineraries of Debre Damo- Mariam Qorqor and Abune Daniel- Abune Yeamta then to Abune Selama or Abune Selama-Abune Yeamta-Mariam Qorqor and Abune Daniel then to Debre Damo.

The geographical location of the monasteries is provided in the left in the figure below while the map of Ethiopia is in the right (Figure 2). Exploratory type of research through cross-sectional research design was adopted to provide answers to the objectives. The study adopted with a qualitative approach that helps to find out the uniqueness of each particular situation by explanation and understanding of the situation's specific phenomenon through naturalistic, qualitative inquiry.

Research Design

Sampling Techniques, Instruments and Method of Data Analysis

The target populations in the study were the religious leaders and monks in the monastery, the respective woreda's head of tourism and culture, tourism experts, and key informants. Since information can be found in the hands of few people, a non-probability sampling technique and purposive in specific was used, where there is no attempt to create a sample that is statistically representative of the population. Rather, people or cases are chosen ‘with purpose’ to enable the researchers to explore the research questions. Thus, all religious leaders and monks in the monasteries which are 102 in number, all tourism heads and experts of the respective woreda (16 in number) and five key informants from each of the woredas were selected purposively based on their experience, interest, proximity, knowledge, duties and responsibilities in the monasteries. Primary and secondary data were collected to reach the objectives. Primary data was collected by using techniques of interviews, field observation and photographs. Whereas,

secondary data were collected from documents such as books, magazines, research reports, journal articles and websites. Finally, the collected data were sorted and categorized in accordance with their source and type. Data obtained through observation has been described in text with the support of pictures. While the data obtained through interviews with different key informants have been analyzed thematically.

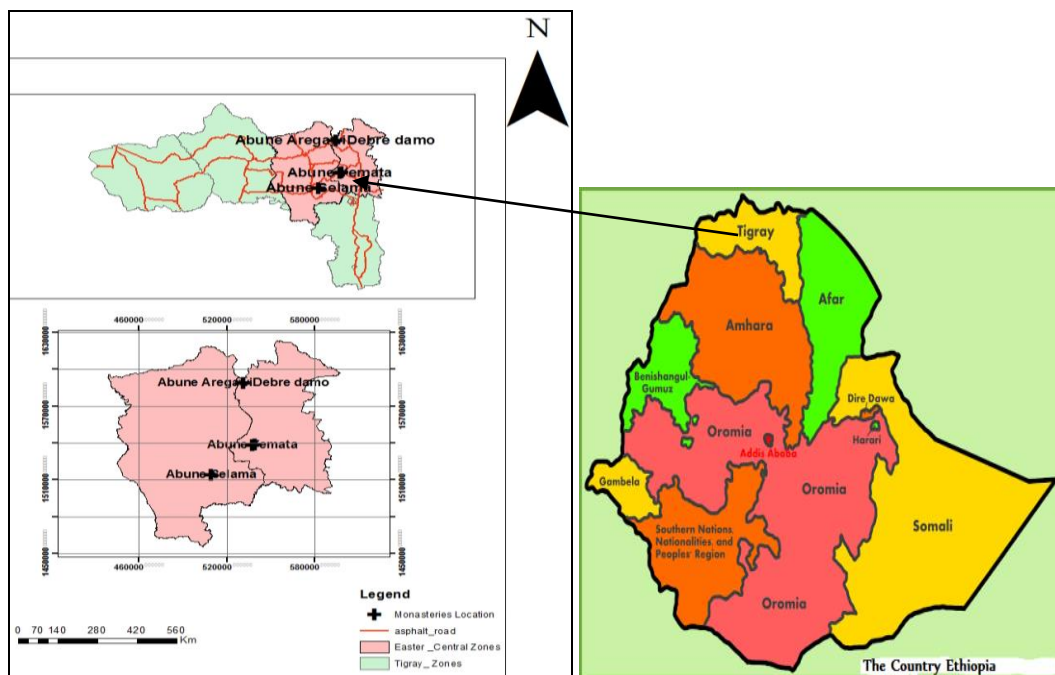


Figure 2. Geographical location of the Monasteries (Sources: Weldemariam Weldeabzgi, 2019)

RESULTS AND DISCUSSION

Geological and Geomorphologic Characteristics of the Monasteries

The geology of the rock-hewn of Tembien-Gheralta-Wukro-Adigrat is characterized by Precambrian rocks, Permo-Carboniferous sedimentary rocks, Middle Jurassic–Triassic to Early Cretaceous sedimentary rocks (Hagege & Ataklti, 2000). The monasteries in this locality area are all carved into Enticho Sandstone or into Adigrat Sandstone (Ibid). Enticho and Edaga Arbi are glacial in origin (shale and tillites). The rock-hewn monuments of Tigray, which are located at altitudes varying from approximately 2100–2500 metres above sea level, have been carved into various levels of the sandstone, from the bottom to the top of the outcrop (Yemane et al., 2016). The monasteries under this study are characterized by these geological and geomorphologic features.

Description of the Selected Monasteries

Abune Selama Monastery

Abune Selama monastery is found in the central zone of *Qola Tembien* woreda on Mekelle-Abi Addi road. It is found around 9 km North-East from Getski Mleslay, a small town. It probably takes one and a half hours by foot to reach the monastery from Getski Mleslay. The geographical location mark on the map of the monastery is displayed below in (Figure 3). The monastery of *Abune Salama*, probably one of the most inaccessible churches in the world, the ascent of Debre Damo being trifling in comparison. We have observed many rock- hewn churches and monasteries in Tigray and other parts of

Ethiopia, but, probably this monastery is the most difficult to climb up. Most of the time you cannot get robes to climb however; if the monk is there he provides you the robes to climb up. The general view and the horizontal narrow walking edge (100m) to reach the stiff vertical is presented in the below (Figure 4).

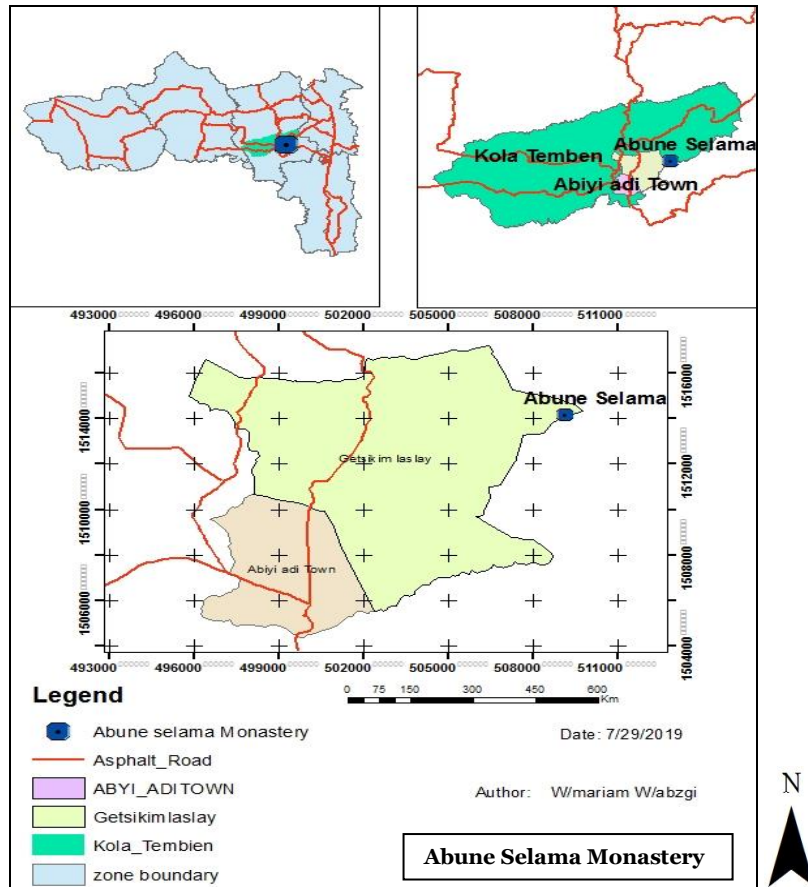


Figure 3. The geographical location of the monastery's mark on Map
(Source: Woldemariam Weldeabzgi, 2019)

As Ruth Plant (1985) explained, after some preliminary scrambles, one reaches the face of the mountain itself, and it is then necessary to follow an extremely narrow ledge, invisible from a distance and lacking handholds of any kind, which cuts across the middle of a tremendous precipice. Having completed this perilous traverse, the visitor must ascend a vertical rock face (45m long), then climb higher while straddled between two parallel rock faces, then clutch a bundle of chains which enable him/her to surmount the final cliff face presented in the below (Figure5). Since the cliff overhangs, the goal remains disconcertingly invisible, but on this last lap the unseen monks above assist the climber by hauling at a thong tied round middle. After climbing up the top cliff (a church in plateau and forest area), one can see similarities with cliff top of Debre Damo. On the top there are a number of houses of the monks, two deep water cisterns (300m deep each), and graves of different monks and the grave of Abune Salama himself. The area is also covered by dense forests and grasses (Figure 6).

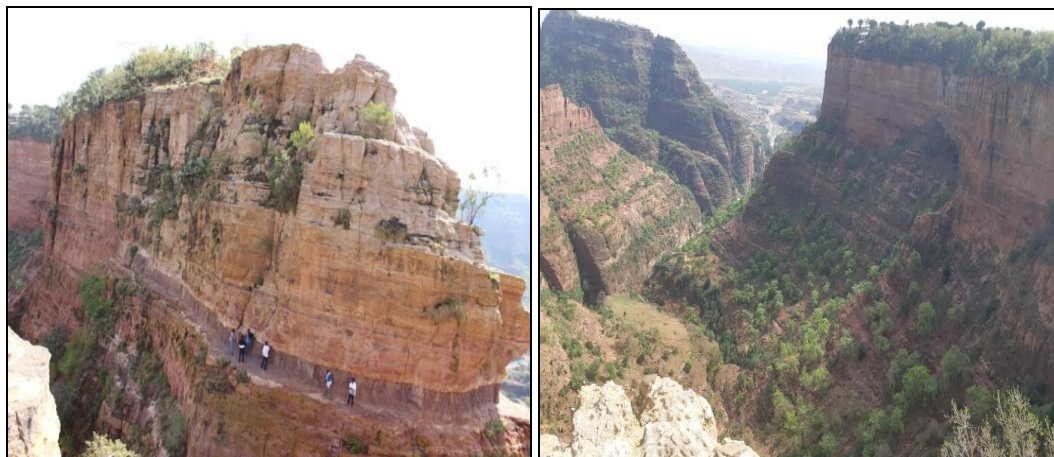


Figure 4. The path to and the magnificent view of the monastery

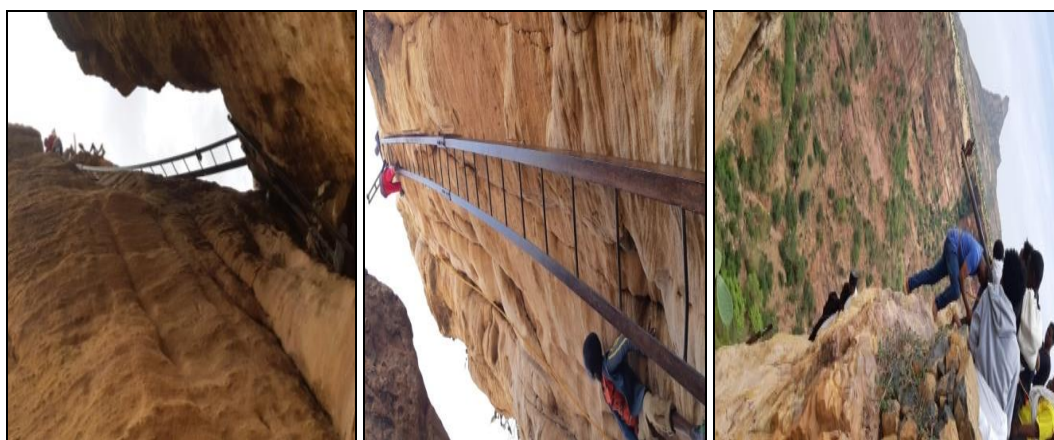


Figure 5: The way to up and down to the monastery



Figure 6. Deep water cisterns in the left and the house of the monks on the right

The monks have used these water cisterns for many purposes such as planting trees, drinking and for holy water. All round the year they do not dry. The monastery is

rock-hewn, the outer one can see on the below figure provided in the left is constructed just to protect rain, established on the escarpment of the top founded by Frumenties, the first Ethiopian bishop, later named as Abba Selama Ksate Birhan probably dates back to 385 AD. After Frumentius had been appointed as Ethiopian bishop, he did a lot of things just to mention some translated of several sacred books from the Hebrew, Greek and Coptic to Ethiopian liturgical language, *Geez*, and preached Christianity throughout the country until his death, finally buried in the monastery.

The external part of the monastery was rebuilt and renewed at different time. The interior part of the monastery is divided into three sections; the chanting room, the sanctuary and holy of holies with 6 pillars. The pillars are rounded in sections, which are unusual, and they tend to expand at either end, while the arches support approximately to a triangular form. The monastery is home to many monks from all corners of the country. They choose it because as we interviewed them, the monastery is situated in an ideal place to be a monk's house and the monastery is the center of theological excellence for centuries. The feast of Abune Salama is celebrated within the Ethiopian Orthodox Church on the 26 of *Hamla*/ August 02 in Gregorian calendar.

During the feast, a number of Christian followers and visitors attend the ceremony. The figure below shows the external part of the monastery in the left and the burial place in the right on the top of the monastery (Figure 7).



Figure 7. The external part of the monastery and burial place of Abune Selama

Abune Yemata Monastery

Gheralta is the home of many rock-hewn churches/monasteries such as Abune Yemata, Mariyam Qorkor, Abune Daniel, Abune Abrham and others. Abune Yemaeta is one of the 'Nine Saints', who came from Syria in the 5th century, established the monastery, monastery, in Debre Selam Kebelle, North of the main road, Hawzen-Worka'Amba road. From the main road, it takes around 20-30 minutes on foot to climb to the top of the church. The geographical location of the monastery mark on location is presented in the figure below (Figure 9). To climb up the church, a tourist requires almost a vertical ascent. After a few minutes' drive from South of Magab or East of Work Amba one can find a signboard that shows the monastery. It does not take a long time to reach there from the drop of car and the visitor walks through the ancient olive trees, small farmsteads and then after, starts to climb up. The below figure shows the way to the top of the monastery ones can climb either through helping robes or with the help of local guides (Figure 10). To climb up there are no ladders and ropes rather taking off your shoes and climbing over a bridge of rock on footholds and handgrips in the rock face. Ewald &

Kleidt (1999) stated that the ascent is the test of one's trust in God: it goes up the sheer rock face, tree trunks lead over an abyss and then one sees the dry stone masonry in which the window to the sanctuary is set. A narrow path leads on the outside along the south wall and ends in front of the unevenly hewn hole. After mounting, a tourist find the small hewn used for baptism and a marvelous view of Gheraleta. When the people of Debre Selam get newborn babies, they baptize here on the top of the monastery.

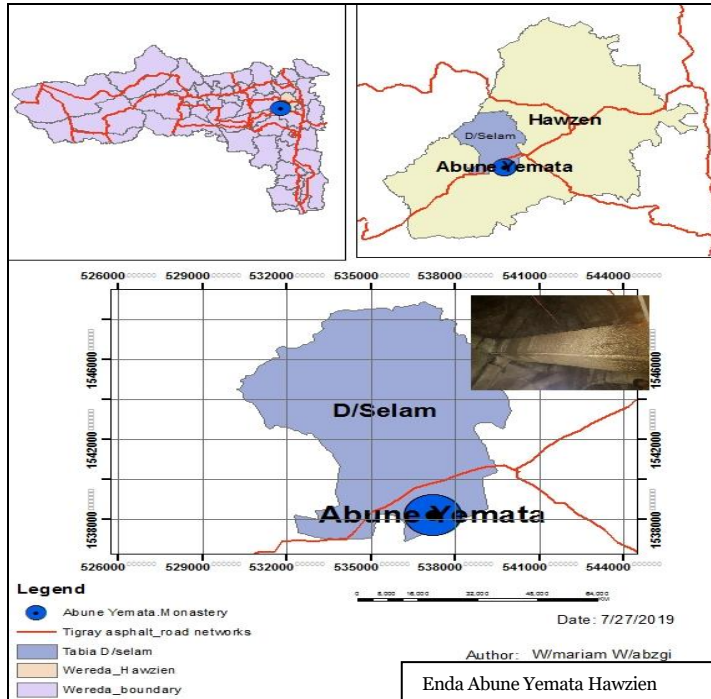


Figure 9. AbuneYemata monastery's mark on Map
(Source: Weldemariam Weldeabzgi, 2019)



Figure 10. The path to the top of the monastery

A tourist after climb up finds the baptizing place illustrated in the figure below in the left and the view of the other nearby cliff from the window of the baptizing place in the right (Figure 11). On the cliff top, the monastery lies in the middle of a needle of rockiness,

the entrance on the side facing the masonry rock. The path leading to the get of the monastery is too narrow, possible to reach through holding the main rock. Not many visitors are comfortable to even attempt the scary ascent, although it is extremely rewarding to enjoy the view from above of sharp drop of the cliff (Yemane et al., 2016). And also Ruth Plant (1985) described the church as the most unusual church in the most unusual place, that the place being splendid and awesome. On the top of the monastery, one can see the view of the mountain chains of Gheralta (Figure 12).



Figure 11. The baptizing place in the left and the magnificent view from the window baptizing



Figure 12. The general view on the top of the monastery

Painting as you can see in (Figure 13) is the main feature of the monastery. The paintings were probably painted during the 6th century as per the interviewed people. The dominate figures painted on the top of the ceiling are prophets from the Old Testament, apostles from the New Testament (in the dome behind the entrance), and monk saints, Isaac, Abraham and Jacob, Moses, Elijah, Enoch.

The interior of the church reached via a small crack in the rock is notable for its extensive and perfectly preserved wall and ceiling frescoes. Four pillars divided the sanctuary into three aisles. They are a chanting room (*Mahlat*), a sanctuary (*Kiddist*) and Holy of Holies (*Bata Makdas*) are the three sections of the church respectively from the outer to the inner part of the church. The monastery was uncovered before two-three

decades to the public. Because of this, the number of visitors visiting it is not such significant comparing to its historic and richness in treasures. This time couples of visitors are visiting the monastery during the annual ceremony of the monastery, *Tkinti* 28 in Ethiopian calendar / November 07 in Gorgonian calendar.



Figure 13. Painting on the ceiling and on the one three of pillars

The Qorkor's Monasteries: Mariam Qorqor and Abune Daniel

Mariyam Qorqor and Abune Daniel monasteries are established North East of Abune Yemata monastery. The geographical location the monastery is marked on map (Figure 14).

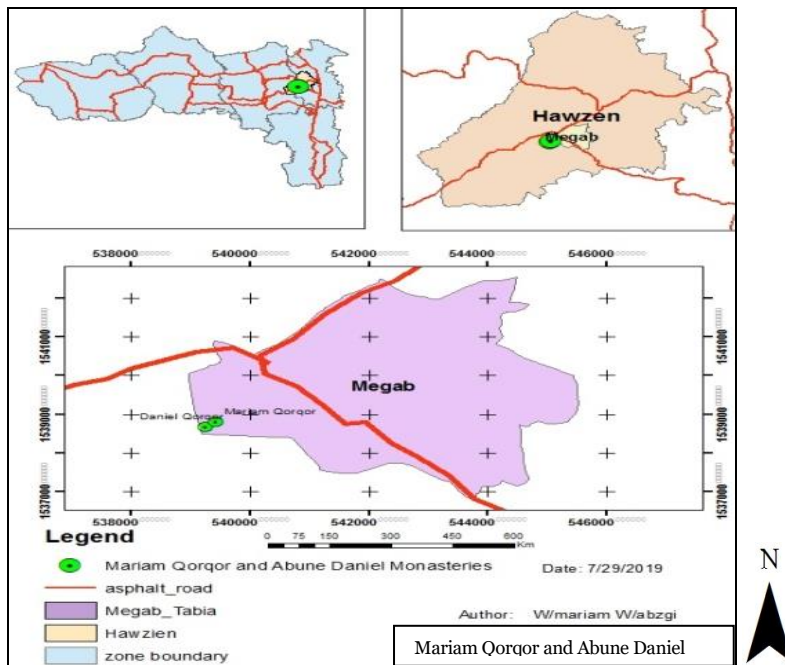


Figure 14. Mariam Qorqor and Abune Daniel's monasteries mark on Map

They are situated on one of the highest mountains of Gheralta in Magab Kebelle. They are found south of Hawzien-wukro main road. It probably takes 40 minutes to one hour walk on foot to reach the top of the church from the Megab village. From the village of Megab to the cliff top of the monasteries one finds sheer stones, olive oil trees, the very

narrow path seems excavated rock, slid cliff up and a down rocky path and at the top one could entertain the magnificent view of Gheralta mountains and Abune Yamata monastery. The way to the monasteries is narrow and cliff which is illustrated in (Figure 15).



Figure 15. The way to reach to the top of the monasteries

The local people asserted that Mariam Qorkor monastery was established during the Abrha We Atsebeha in the 4th century. Most of the Gheralta, Wukro and Atsbi and others rock-hewn churches of Tigray were established during the Axumite Kings of Abrha We Atsebeha in the 4th century. The establishment of the monastery of Mariam Qorqor is facing east and with basilica ground plan with a nave and two aisles.

The interior part of the monastery has three sections namely: *Mahlat*, *Kiddist* and *Bata* Makdas as similar to the other Ethiopian monasteries. The internal part of the monastery is demonstrated in the figure below in the left and the external one is in right (Figure 16). The columns have bracket capitals and are cruciform in design which are eye catching. There is also a series of beautifully decorated arches. The arches and ceiling of the church are decorated with bas reliefs. One can see different animals, apostles, and St. Marry paintings on the walls, pillars and ceiling of the church. One of the columns a magnificent painting depicts Archangel Ruphael can be inspected.

And also the church has a wide collection of parchment manuscripts, crosses, musical instruments and many other liturgical objects. Abune Daniel monastery is probably established in the 6th century who came from Atsbi We Mberta, Tigray, only takes few walk along the side of the mountain from the monastery of St. Marry/ Mariam Qorkor, and consists of two interconnecting rooms. In the two rooms, there are primitive decorations.

In general, to climb up to the hilltop of the two monasteries is really terrifying. However, when one reaches the top, it is really best to relief since one can see chained mountains and magnificent landscapes being from the top of the mountain. The figure below shows the splendid view of the Gheralta from the top of the monasteries of Mariam Qorqor and Abune Daniel (Figure 17). Though there is a slow increase of tourists from year to year, it is not much as the monastery deserves as per to the interviewed people. A number of visitors come to this monastery during the annual ceremony of the monastery, *Hidar* 6 in Ethiopian calendar or November 15 in Gorgonian calendar.

Debre Damo Monastery: Abune Aragawi

Debre Damo monastery is considered as the first monastery and one of the top monasteries in Ethiopia (Sergew, 1972). It is located in Tigray Regional State in the

Eastern Zone in Mazabir Kebele, Gula Mukada Woreda. The monastery is found 25Km far from Adigrat to the west direction and 15 Km east far from the small town Bizat, on a mountain/*Amba*-900 feet high- north of the Adigrat/Adwa main road (Ruth Plant, 1985). The geographical location of the monastery is marked on Map (See Figure 18).



Figure 16. The external and internal part of Mariam Qorkor monastery

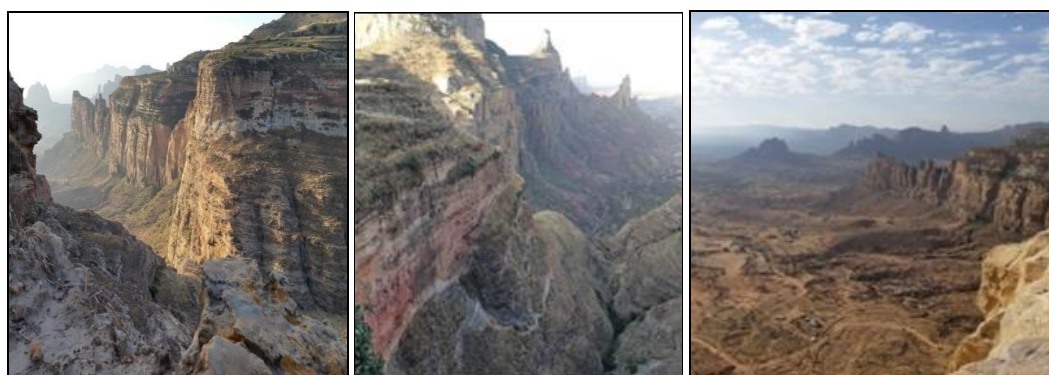


Figure 17. The glorious scenery view from the top of the monasteries

It traces its foundation back to the most respected of the nine saints who called Abune Za-Mikael or Aregawi, who came from Syria in the 5th century and sought refuge in Ethiopia during the Axumite king called *Atse Gebremeskel* (Taddese, 1972). The Monastery is on the clifftop (vast plateau at the top) only accessible by climbing or being hoisted on a 16-meter plaited leather rope, locally called *Janda*, which is used for pulling up to the Monastery and hanging down (lowered) from the top of the cliff. The precipitous cliffs soar up some 30 meters, no gentle slope, no place offerings a possibility for climbing up. The ropes are two in number which helps to climb to the top of the monastery.

The one is used for hauling different materials, equipment's, animals and corpses and the other rope is used for transporting monks and other guests up and down. The way of ascending to the top of the monastery with the help of robe is presented in the figure below (Figure 19). Ewald & Kleidt (1999) stated that Debre Damo stands like a rocky island in the sky. As to the local people believe, Abune Aregawi has been taken to the top of the mountain or *amba* with the help of the serpent which was commanded to do so by

God. Today, the ropes symbolized the serpent instead. Before one climb to the mountain, it seems the cliff top is small only hosts the monastery. However, on the top, everything looks like a quite normal small village in the Tigrean Village Mountains. As the data obtained from the interviewed monks, on the top, there are more than 150 stone houses of the monks, 150 series of water cisterns, used for drinking and baptism, more than 150 cove graves buried in different periods and a number of male animals, females are not allowed to climb, one can find male hen, ox, got and sheep. In addition to these, there are a few trees provide shade and grasses used for the animal graze on the sparse stalks (Ruth, 1985). The the figure below shows water cisterns and home of the monks, typical Tigrian house building (Figure 20). Debre Damo was the center of spiritual and theology dogmatism which has experienced brilliant epochs and the medieval periods (Taddese, 1972; Ruth, 1985; Ewald & Kleidt, 1999). Debre Damo possessed one of the most valuable and richest collections of manuscripts. In addition to the holy books, musical instruments and liturgical objects ancient coins were found which date back to early as the 1st and 3rd century AD (Ruth Plant, 1985). The monastery was renewed and re-built by the successive Ethiopian rulers. Just to mention some it was repaired in the 9th and 12th centuries, reconstructed in the 12th and 14th and again the 19th (Georg, 1970; Segew, 1972; Taddese, 1972). The impressive external part of the architecture of the monastery is presented in the figure below (Figure 21). Like the other Ethiopian monasteries, the interior part of the monastery has three sections: the chanting room, the sanctuary and the holies of holies. On the ceiling of the monastery one can observe wooden carvings of different animals such as cattle, elephants, birds which have stories with the Old and New Testaments.

The annual ceremony of the monastery takes place on Tikmti 14 in the Ethiopian calendar or on October 24 in Gregorian calendar. In the ceremony, thousands of Christian followers and hundreds of visitors attend the ceremony in a colorful way.

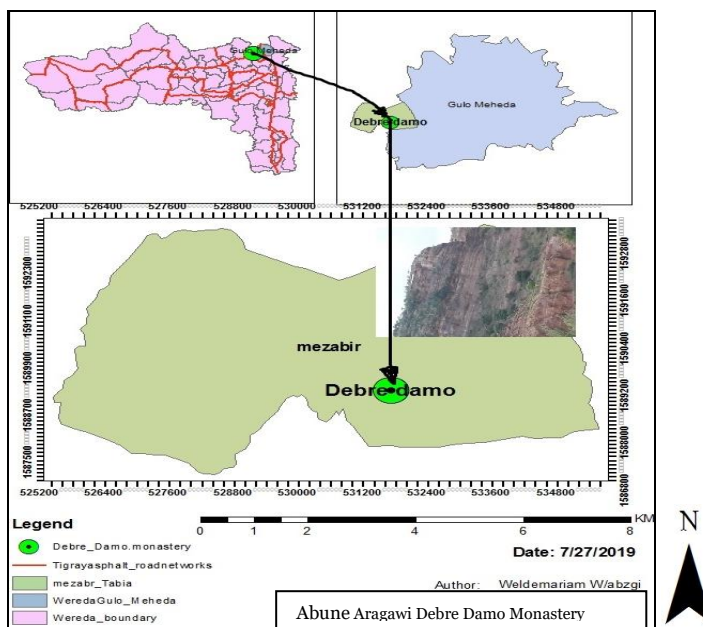


Figure 18. Debre Damo's Monastery Mark on Map

In general, all the monasteries under study have magnificent natural, splendid view and cultural heritages such as the replica of the Ark of Covenant, the original is in Axum

St. Marry church; a number holy books; crosses made up from wood, silver and gold; crowns given as gift by the kings and other lower rulers; the external and internal architecture of the monasteries, musical instruments like drum, cestrum, stick- prayer and great harp; and other liturgical objects like church bell, umbrella, incense burners, skull caps and trophy etc. In the figure below a sample of common treasures of the monasteries (holy book, bell, crowns and cross, drums, church close and stick-prayers) are demonstrated (Figure 22). Based on the data gathered through internal observation and interview, all the monasteries have a shortage of tourist facilities, no clear time for entry and exit, no entrance fee, no risk management task, no professional guides, and above all the way of preservation of the heritages are not satisfactory.



Figure 19. The way of ascending to the cliff top with helping of rope

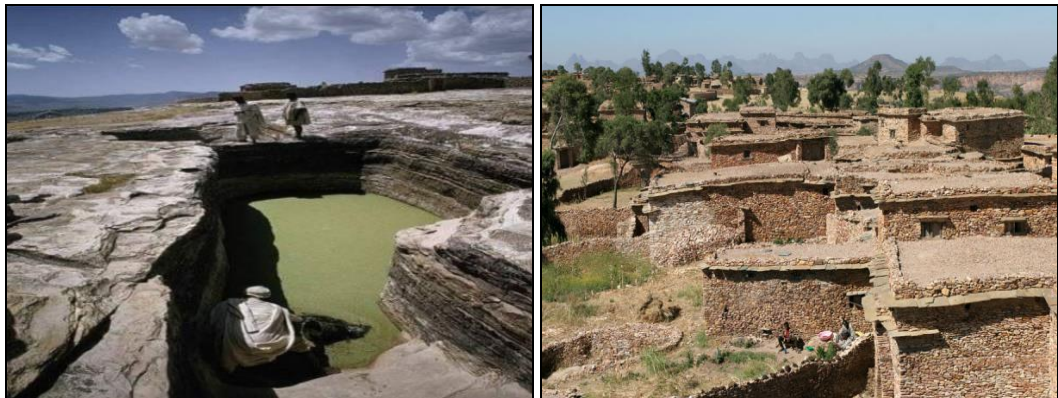


Figure 20. Sample of the cisterns and the home of the monks

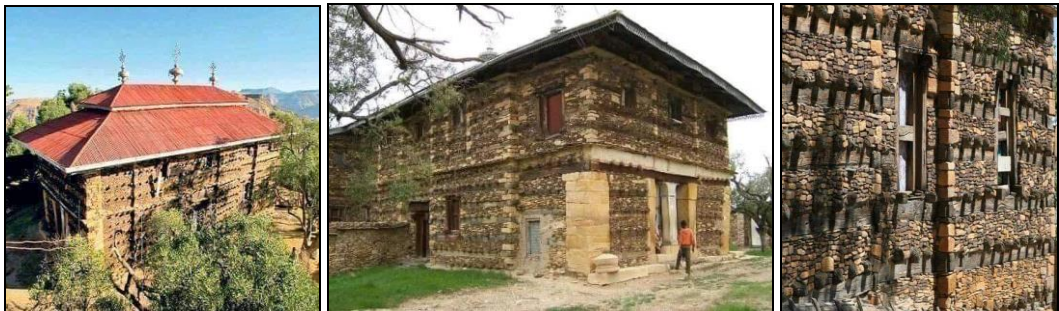


Figure 21. The external part of Debre Damo monastery



Figure 22. Sample of the treasures in the monasteries

Adventure Tourism Activities in the Monasteries

The rock hewn churches of Tigray, particularly those of under study, provide tourists both hard and soft adventure. The monasteries are known for their fame and mystery in terms of inaccessible location, religious treasures and hidden in the far rocks of Tigray, Ethiopia. The climbing to the monasteries is really pleasant and worth reporting. The monasteries of Abune Selama, Debre Damo, Yemata, and Mariam Qorqor and Daniel Qorqor respectively can be classified among the most inaccessible sites in the world. Within adventure tourism, there are two main categories of adventure activities, soft adventure and hard adventure (UNWTO, 2014). The following are the major activities that can be experienced in the monasteries under study provided in (Table 1).

As indicated in the above table the monasteries have the potential to provide 20 adventure activities out of the 33 activities recognized by UNWTO. Out of these 20 adventure activities that visitors can experience in rock-hewn churches of Tigray, the three activities are hard adventures i.e. caving, trekking and climbing.

The Potential Benefits of the Monasteries as Adventure Tourism Sites

The tourism sector is known for its ability to create jobs and generate foreign exchange, and as such, many local authorities seek to encourage tourism activities and attract visitors (WTTC, 2017). Adventure tourism can have enormous benefit to tourist destinations, creating employment and income and providing a strong incentive for conservation (Rannvá, 2017). The rock-hewn churches of Tigray are contributing about 2% of the regional GDP (Tigray Culture and Tourism Bureau, 2019).

Table1. Activities and their adventure classification of the Rock-hewn churches of Tigray
(Data sources: ATTA, 2013, as cited in UNWTO, 2014)

No.	Activities	Rock hewn Church under study	Type	No.	Activities	Rock hewn Church under study	Type
1.	Archeological expedition	-	Soft	18.	Hunting	-	Soft
2.	Attending local festival/fairs	All	Other	19.	Kayaking/sea/whitewater	-	Soft
3.	Backpacking	All	Soft	20.	Learning a new language	All(Geez)	Other
4.	Bird watching	Abune Selama	Soft	21.	Orienteering	-	Soft
5.	Camping	All	Soft	22.	Rafting	-	Soft
6.	Canoeing	-	Soft	23.	Research expeditions	All	Soft
7.	Caving	All	Hard	24.	Safaris	All	Soft
8.	Climbing (mountain/rock)	All	Hard	25.	Sailing	-	Soft
9.	Cruise	-	Other	26.	Scuba Diving	-	Soft
10.	Cultural activities	All	Other	27.	Snorkeling	-	Soft
11.	Eco-tourism	All	Soft	28.	Skiing/snowboarding	-	Soft
12.	Educational programs	All	Soft	29.	Trekking	All	Hard
13.	Environmentally sustainable activities	All	Soft	30.	Walking tours	All	Other
14.	Fishing/fly-fishing	-	Soft	31.	Visiting friends/family	-	Other
15.	Getting to know the locals	All	Soft	32.	Visiting historical sites	All	Other
16.	Hiking	All	Soft	33.	Volunteer Tourism	All	Soft
17.	Horseback riding	All	Soft				

It can also raise public awareness of the many goods and services provided by biological diversity and of the need to respect traditional knowledge and practices (UNWTO, 2014). In particular, adventure tourism is attracting attention for its emphasis on rural areas, local culture, and because it can often be developed within existing infrastructure. Often, it is the presence of visitors that makes it a destination, rather than destinations seeking to create a tourism activity (*Ibid*). The monasteries under study have potential benefits to:

Benefits to Visitors

As data gained from the interviewed people and field observations, the benefits of visiting the adventurous monasteries are discovering new experiences, health, scenic view and unique environment, flora and fauna, escapism, education, history, extreme sports activities like climbing, skiing, walking, fun and excitement, interaction with environment/people and self-fulfillment. In so far, the religious aspect is the other benefit to get from visiting these historic monasteries.

Benefits to the Host destinations

Local communities: The local communities have high potential benefits if these momentous monasteries have been used fully for tourism purposes. Though these monasteries could offer very important economic, socio-cultural, environmental and educational benefits to the local people, they do not get the expected benefits.

Economic benefits: From the macroeconomic perspective tourism is becoming clearly an important source of economic growth in Ethiopia and Tigray too. It is real that tourism can have significant direct benefits at the local level by generating employment and improving wages, and several indirect effects such as stimulating growth in tourism-related activities such as services, transportation, and handicrafts.

Socio-cultural benefits: As we observed, and data obtained from interviewed monks of the monasteries though it is still encouraging the number of monks in all of

the monasteries is decreasing because of the situation of the monasteries far away from urban centers and the economic issues. Therefore, if tourism is well planned, developed and managed in a socially responsible manner, it will encourage the monks to live with the respective monasteries. In addition, if tourism is well developed on all of the monasteries, the people in the villages will have a sense of pride, maintains their culture, customs, and the priceless tangible and intangible heritages. Furthermore, the people living near the monasteries can an opportunity for interacting and exchanging cultures, experience and ways of living from others.

Educational values: All the selected monasteries were and are center of religious excellence for a long period of time. Before modern education was started in Ethiopia in the 20 century, these monasteries served as center of religious education, particularly Debre Damo monastery. The monasteries own very significant national heritages that could serve as center of research and education. The present society can find their truly forefathers identity from these valuable monasteries.

Environmental values: The geographical settings of all the monasteries are situated in a very inaccessible mountain/ hilltop areas. A little bit the areas have better forest coverage and home of different animals and species. The indigenous forests, animal and species found there help to know well the environment for what to do and not to do. In addition to the potentials of adventure tourism, the monasteries environs could be best place for exercising eco-tourism. If eco-tourism is exercised and developed then the forests, animals and even the quality of the environment get rich. Furthermore, the Chain Mountains found in Gheralta, Abune Selama and Debre Damo are the best laboratories for researchers to know the land formation history of the area and Ethiopia at large.

CONCLUSIONS AND RECOMMENDATIONS

Conclusion

Tigray, one of the nine regional states of Ethiopia, is the cradle of civilization which owns abundant natural, cultural, historical and archaeological treasures. From the abundant tourism resources of the region, this paper has investigated the potentials of mountain adventure religious tourism in Tigray's selected monasteries: Abune Selama, Abune Yemata, Mariam Qorqor and Abune Daniel, and Debre Damo, and the potential benefits from the adventures tourism. The authors choose these monasteries because of their indispensable heritage potential; geographical settings that all the monasteries are found very inaccessible areas, the visitor activities could be done in all of the monasteries and one can visit them in one way of itinerary either the way of Debre Damo- Mariam Qorqor and Abune Daniel-Abune Yemata,-and Abune Selama or vice versa. All the monasteries are the best ideal sites for both hard and soft adventure tourism. Climbing and trekking to the sites makes them ideal sites for hard adventure tourism and then on the top one can see and visit very historic and plentiful heritages makes the sites ideal sites for soft adventure tourism. If well and planned adventure tourism is developed in all the sites many benefits can be achieved to both visitors and to the host communities. Visitors could get experiences, education, sport, history, unique environment, flora and fauna, fun and excitement, interaction with environment and self-fulfillment where as the host destinations could get tourism business, income, employment, educational values, the sustainability of the heritages and environmental richness.

Recommendations

Based on the discussions and results the following recommendations are forwarded to the concerned bodies:

- All the monasteries require professional guides and facilities.
- All the monasteries require having full service delivery, entry and exiting time.
- There needs to develop risk management to climb up and down in each of the monasteries.

- The migration of the monks and deterioration of the heritages particularly the holy books requires attention.
- Well planned and organized adventure tourism development (specific interest tour package) is needed and leading role should be started by culture and tourism of the region and the respective Woredas.
- Almost all the monasteries have a problem with the road. Therefore, the Regional Government, the Regional Culture and Tourism Bureau and the respective Woredas should work in cooperation at least to have a rough road to the monasteries.

Acknowledgments

The authors delighted to thank Aksum University for the opportunities created us to visit the sites and to the respondents for their unreserved time and willingness to give us the necessary data. Finally, we want also to thank all local guides and monks of the monasteries for their help to climb up and down and visit the monasteries.

REFERENCES

- Ayalew, S. (2010). *Historical Development of Travel and Tourism in Ethiopia*. Ethiopia: Pelicans.
- Erimias, K. (2014). Challenges of Religious Tourism Development; the Case of Gishen Mariam, Ethiopia. *American Journal of Tourism Research* Vol. 3, No. 2, 2014, 42-57, p, 18, DOI: 10.11634/216837861403567.
- Ewald, H. & Kleidt, B. (1999). *Ethiopia-Christian Africa: Art churches and culture*. Ratingen, Mellina-Verlag.
- Ewert, A. (1989). *Outdoor Adventure Pursuits: Foundation, Models and Theories*. Columbus OH: Publishing Horizons.
- Georg, G. (1970). *Church in Rock: Early Christian Art in Ethiopia*. Phaidon Press Ltd., London/.
- Goodnow, J. (2005). *Adventure Group Traveler*. Retrieved from <http://www.ntfonline.com/research/ResearchResources/Adventure-Group-Traveler.php>.
- Hagege & Ataklti. (2000). *The Churches of Tigray* (in Amharic), Tigray Ethiopia.
- Mason, D., A. (2016). *Mountain-Adventure Tourism Combined with Religious Tourism; A Fresh Paradigm for Sustainable-Green Destination-Development in Korea*. [Power Point Slides]. Retrieved from Website file:///C:/Users/DELL/Desktop/adventure%20tourism%.pdf.
- Rannvá, S. (2017). *Adventure Tourism: the Faroe Islands a Place Undiscovered*. Faroe Islands.
- Ruth, P. (1985). *Architecture of the Tigre, Ethiopia*. Ravens Educational and Development Services, London.
- Schneider, P. P., & Vogt, C. A. (2012). Applying the 3M Model of Personality and Motivation to Adventure Travelers. *Journal of Travel Research* 51 (6), p, 15.
- Sergew, H. (1972). *Ancient and Medieval Ethiopian History to 1270*. Addis Abeba, Ethiopia.
- Sung, H. (2004). Classification of Adventure Travelers - Behavior, Decision making, and Target markets. *Journal of Travel Research* 11(10), p, 19.
- Sung, H. H., Morrison, A. M., & O'Leary, J. T. (1997). Definition of Adventure Travel: Conceptual Framework for Empirical Application from the Provider's Perspective. *Asia Pacific journal of tourism research* 21(8), p, 11.
- Taddesse, T. (1972). *Church and State in Ethiopia 1270-1527*. Clarendon Press, Oxford.
- Wanfei, W., Joseph, S. & Keji, H. (2015). Religious Tourist Motivation in Buddhist Mountain: The Case from China, Asia Pacific. *Journal of Tourism Research*, p.8, available at <http://dx.doi.org/10.1080/10941665.2015.1016443>
- Weber, K. (2001). Outdoor Adventure Tourism: A Review of Research Approaches. *Annals of Tourism Research*, s. 360-367, p.19.
- William, L. (1981). *Pillars in Ethiopian History; African History Notebook*. Haward University Press, Washington D.C.
- Yabibal, M. (2010). Tourist Flows and its Determinants in Ethiopia. *Ethiopian Development Research Institute*, Addis Abeba, Ethiopia.
- Yemane, G., Nebeyat, T. & Yonas, T. (2016). *Discover Tigray: The Open Air Museum*. Tigray National Regional State Culture and Tourism Bureau, Tigray, Ethiopia.
- Yolande, M. (1972). *The Church of Ethiopia*. II Poligrafico, Asmera.
- *** Tigray Culture and Tourism Bureau (2019). Report on Tigray's Tourism Development. 2019, 10 (5), 23.
- **** Webster, M. (2017). *Dictionary*. Retrieved from Merriam Webster: <https://www.merriam-webster.com/dictionary/exciting>.
- *** World Tourism Organization (UNWTO). (2014). *Global Report on Adventure Tourism*. UNWTO, Madrid.
- *** World Travel and Tourism Council (2017). *Travel and Tourism Economic Impact on Ethiopia*. WTTC, Madrid.

Submitted:
31.08.2019

Revised:
15.11.2019

Accepted and published online
19.11.2019

ADVENTURE TOURISM SPECTRUM, ENVIRONMENT AND LIVELIHOOD OPPORTUNITIES: A CASE STUDY IN SOUTHERN SINGALILA TREKKING CORRIDOR OF INDO-NEPAL BORDER

Premangshu CHAKRABARTY*

Visva-Bharati University, Faculty of Geography, Department of Geography,
Santiniketan, Bolpur, West Bengal, India, e-mail: drpremangshuindia@gmail.com

Sanjoy Kumar SADHUKHAN

Visva-Bharati University, Department of Geography,
Santiniketan, Bolpur, West Bengal, India, e-mail: sks.geo86@gmail.com

Citation: Chakrabarty, P., & Sadhukhan, S.K. (2019). ADVENTURE TOURISM SPECTRUM, ENVIRONMENT AND LIVELIHOOD OPPORTUNITIES: A CASE STUDY IN SOUTHERN SINGALILA TREKKING CORRIDOR OF INDO-NEPAL BORDER. GeoJournal of Tourism and Geosites, 26(3), 1092–1104. <https://doi.org/10.30892/gtg.26331-419>

Abstract: Promotion of adventure tourism is debated for its impacts on environmental quality. For minimization of impacts, soft categories of adventure tourism are preferred worldwide with geotourism packages to serve the adventure seekers. It is widely appreciated as a strategy for geoconservation and sustainable development. Southern Singalila range in the border of India and Nepal is famous for trekkers as well as for its unique Land Rover tourism. This paper is an attempt to evaluate the perception of host population on tourism activities with reference to livelihood opportunities and environmental impacts. Both qualitative and quantitative methods have been adopted for the analysis with application of GIS in mapping. The scope of introduction of geotourism in adventure tourism spectrum has been evaluated from sustainability perspectives.

Key words: Land Rover, Trekker, Geotourism, Geoconservations, Sustainability

* * * * *

INTRODUCTION

Adventure tourism is the activity based tourism, which incorporates risk of different dimensions. Level of risk and uncertainty are the keys motivating adventure seekers to opt a destination of activity tourism (Weber, 2001). The origin of adventure tourism could be traced back in the urge of satisfying ego aspects of the consumers. This is why adventure tourism is categorized as ego tourism from travel motivation perspective by the sociologists working in the field of tourism as well as in the researches of the other behavioral scientists. Ego tourism is a function of serious leisure in which the tourists have

* Corresponding author

opportunities to satisfy their ego by expressing their abilities, fulfilment of their pursuit and identify themselves as unique human beings (Stebbins, 1982). In such tourism, ego of consumers are of prime importance while the attractions are just the objects for their ego satisfaction. The model put forwarded by Maslow (1970) may be conceived as the base for explanation of the ego centricity in adventure tourism. In Maslow proposed ordered hierarchy of human needs (Table 1), motivation for adventure tourism could be identified in level 5 as one of the highest level personal motives.

Table 1. Maslow Model Explaining Hierarchal Level of Adventure Tourism (Data source: Triangulation from a number of literatures studied: Maslow, 1970; Kaplan, 1975; Stebbins, 1982; Swarbrooke et al., 2003)

Level	Need (after Maslow)	Travel and Tourism Paradigm
I	Physiological:hunger, rest thirst and shelter	Travel for body comfort
II	Safety and security	Recreational tourism paradigm
III	Belonging and love: sociological	Travel and social relationship
IV	Esteem: cultural	Travel for outstanding experiences
V	Personal self fulfilment	Adventure tourism paradigm

The flow of tourists from core countries of Europe and North America to the peripheral countries depends on the appeal of a variety of attractions which are considerably unique (Pearce, 1979). Tourism is considered to be a practical means for development for the periphery if it is community based and responsible (Atanga, 2019).

A number of new terms have been derived in the tourism marketing to explain the motivations, acting as a pull factor for the visitors from core to periphery. The wilderness of the National park (Figure 1) and to view the world renowned snow peaks (Figure 2) are among such attractions that draw the adventure tourists in peripheral region for serious leisure. It is noteworthy to mention that serious leisure (Hamilton-Smith, 1993) is a term that is intimately related with both adventure tourism and geotourism. This is because neither adventure tourism nor geotourism are recreation oriented mass tourism products. In both the cases, the motivation of travel is to experience and learn from the dynamics of natural systems. Casual leisure is the opposite pole of serious leisure in the leisure continuum (Kaplan, 1975) and adventure tourism and geotourism could be identified among the serious leisure oriented activities. The trekking in the study region initiates from Manebhanjyang, a market town offering facilities and amenities. In the initial segment from Manebhanjyang to Chitrey (about 3 kilometers), the physical capabilities of the adventure seekers have been somewhat tested on exposure to a steep slope of about 30° on an average. On the way from Chitrey, the trekkers experience a number of minor landslides which may raise their interest on origin and evolution of geomorphosites.

After a night stay at adventure tourism camp of Tonglu or Tumling (about 9 kilometer from Chitrey), they enter in a geotourism paradise on the next morning the glimpse of which have been presented in Figure 2, 3, 4, 5 and 6. The trekking destination Sandakaphu is an interesting domal shaped structure subjected to conspicuous physical weathering and climbing on the top (3636 meter from m.s.l) is an outstanding adventure tourism experience for a geotourist. Thus there is scope of symbiosis between adventure tourism and geotourism in the study region. Geotourism sites may provide adventure tourists a number of appreciated destinations and thereby being responsible for a boost in the soft adventure tourism sector. This is why in places like the Southern Singalila trekking corridor where adventure tourism is supported and supplemented by geotourism attractions, the mountain tourism industry has reached to its climax.

Considered to be an emerging subset of tourism (Christiansen, 1990), adventure tourism incorporates group of adventures, classified as the hard and soft (Beedie &

Hudson, 2003). The more adventurous is the type of activities offered by the entrepreneurs, the tourism concerned is categorised as hard subjected to the level of risk intensities (Dar, 2014). Hard and soft are actually the two relative terms that constitute the opposite sides of a continuum of adventure tourism spectrum depending upon the application of risk theory (Gyimothy & Mykletun, 2004). It is from the beginning of the 21st century, adventure tourism has been recognized as the promising sector of global tourism industry (Swarbrooke et al., 2003). Being classified as an activity based tourism, adventure tourism may be land based, water borne or air based (Page et al., 2005). Southern Singalila range (Figure 3) is one of the unexplored paradises for land based adventure tourism. It offers the scope of paragliding, day trekking, nature walk and rock climbing along with an uncommon adventure tourism product named Land Rover tourism. With the research questions on impact of adventure tourism development on host population, the study was initiated. This paper attempts to address the research gap on the scope of symbiosis between geotourism and trekking for the use of planners and entrepreneurs concerned on sustainability issues.



Figure 1. Entry gate of Singalila National Park

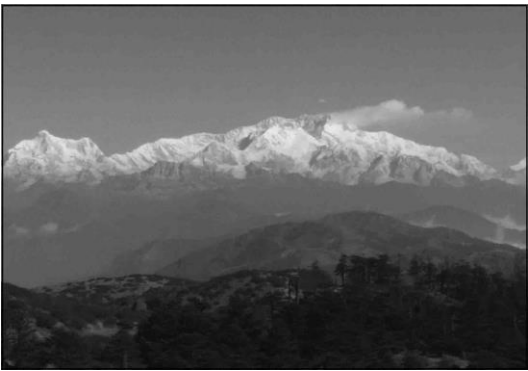


Figure 2. View of Kanchendghongha Series of snow peaks from trek route

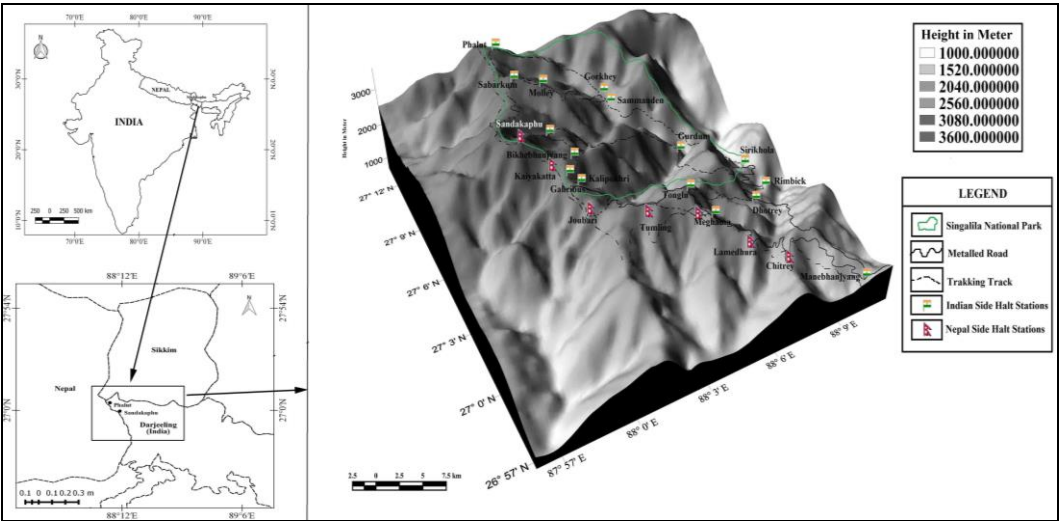


Figure 3. Southern Singalila range accommodating a trekking corridor

THE STUDY AREA

The topography of the trek route is the outcome of prolonged denudation under polycyclic geomorphological processes, which makes it a geotourism paradise. Past effects of glacial cycle are also present on existing landforms. The landscape is subjected to the operation of mass wasting processes resulting into regular landslides and avalanches during monsoon as the water pressure accumulated over the surface causes sudden collapse, often produces casualties of considerable dimensions. The running water is the most active agent of erosion and flash flood is considered as the dominant triggering agent of severe geomorphic hazards (Kapur, 2010). Depending on surface gradient, the discharge rate varies from place to place all over the southern Singalila range.

The previous planation surface is prominent on the trek route from Sandakaphu to Phalut, the uppermost layer of which is full of debris. In Holocene period the region experienced the last uplift and since then the topography is subjected to continuous sub-aerial denudation. This is why conspicuous waterfalls are absent in the trek route and only a few cascades (Figure 4) that become active in rainy season manifest the geomorphic and tectonic history of the landscape. A number of faults and joints represents the past tectonics activities that is a characteristics of Himalayan geology (Wadia, 1963). At Kalipokhri, one of such fault line is prominent at the vicinity of a lake (Figure 5) at the head of Lodhma Khola, which is regarded as a sacred site for both the local Hindus and Buddhists. The community perceives the tectonic forces as a magical force which is responsible for all creation and destructions.



Figure 4. Cascade on Rammam River



Figure 5. Fault guided lake at Kalipokhri

A nappe structure at Kaiyakatta (Figure 6) is represented by the bedding planes composed of hard, compact rock masses. Down slope movements of debris from convex summit segment of slope have been subjected to gravitational collapse while tectonic effect on landforms are very much prominent in transverse fault areas. The planation surface elevated by tectonic movements experienced a series of unwrapping and thrusting. Mechanical weathering is dominant along with different types of mass movements (Ollier, 1979) to sculpture the geotourism landscape. The word Singalila has its origin in Tibetan word *Singley-La* which means a tree covered mountain pass (Lama, 2009). The region is inhabited by people of diverse ethnicities like Lepcha Gorkha, Sherpas, Tibetans, Rais, Tamangs, Chettris, Bahuns, Sunwars, Limbus, Gurungs and Bhujels belonging to Mongoloid racial stock. An altitude specific trend (Table 2) in the distribution of these communities bears direct relationship with literacy and employment status. Since Manebhangyang is the Land Rover hub, Rai and Chettry communities who are more literate

and educated being found engaged in Land Rover (Figure 7) oriented tourism services while the other communities with less literacy and education level, who are settled below 2000 meters of altitude are engaged mostly in agricultural and small business activities.

Lepchas are agriculturists by tradition and they used to practice agriculture irrespective of altitude where they have been settled. In settlements along the trek route, local people are serving as hoteliers and shop owners to cater the tourists and trekkers. The communities found in between 2000-3000 meters are mostly the practionners of animal husbandry with horticulture while the communities found above 3000 meters are largely dependent on trekkers and tourists for their livelihood at present. Tourism acts as the agent of social cohesion and community development (Cappucci, 2016) and it is very much prominent in the high altitudinal areas of southern Singalila trekking corridor.



Figure 6. A nappe structure at Kaiyakatta



Figure 7. Land Rover, the moving heritage

Table 2. Relation of relief with ethnography (Data source: Ethnographic survey during field visit 2018-2019)

Height in Meters	Name of Villages	Dominant Communities
Below 2000	Manebhangyang, Chitrey, Sirikhola, Gurdum	Rai, Lepcha, Gorkha, Chettris, Limbus
2000-3000	Lamedhura, Tumling Bikhebhanyang, Gorkhey Kalipokhri	Gorkha, Nepali, Tibatans, Lepcha, Tamang
Above 3000	Sandakaphu, Phalut, Sabarkum	Gorkha, Nepali, Tibatans, Tamang, Gurungs.

OBJECTIVE OF THE STUDY

1. To study the status of existing trekking and Land Rover safari in the study region.
2. To investigate the man nature interface in relation to the promotion of adventure tourism in Singalila forest villages.
3. To explore the potential of newer types of adventure tourism combining with sustainable geotourism which would be suitable for the habitat, economy and society.

MATERIAL AND METHODS

According to 2011 census the total population of Singalila forest (India side) was 1632. This population was distributed among the eight villages of varying population sizes. For conducting focus group discussions (FGD), the participants have been stratified with respect to age, literacy and education level, occupational status and stakeholder status. The total sample size is 164, i.e. 10 percent of total population. Focus group discussion has been adopted as one of the data generation techniques availing the

opportunity of interviewing several respondents from the community systematically and simultaneously (Babbie, 2011). Rooted in market research, FGD is a structured grouped process conducted for the purpose of obtaining detail information on specific topic, product or issue (Zarinath & Siti, 2009). As FGD is widely recognized as a tool for qualitative field research, it has been undertaken in understanding the perception of the community on various tourism related issues, which are further dealt with the application of statistical techniques like Chi-square test. For the present study, the FGD is conducted in India side villages during lean season when the stakeholders of hotels and homestays have provided sufficient time on their leisure (gathering 8-12 in number) and discussed on several issues put forwarded for their perusal. A number of new sites and scope of paradigm shift in the field of adventure tourism and its relation with disasters are among the outcomes of such discussions. The livelihood status of the villagers was taken into consideration and adventure tourism is appraised for its scope of providing new employments and fresh income. The conflict of interests among the stakeholders of trekking and Land Rover tourism activities is an interesting arena in focus group discussion. The discrimination between India side and Nepal side villages on adventure tourism operations has been taken into special consideration in view of the difference in environmental laws and guidelines of these two sovereign countries. The benefits from Land Rover tourism for the villagers of both the countries have been compared with a view to the fact that a number of the Land Rovers are operated by the Nepalees and they used to accommodate their passengers for night stay in Nepal side villages.

From theoretical standpoint, there is no doubt that the study region is vulnerable to various geomorphic hazards and disasters. The anthropogenic factors relating to various tourism operations are vital in the context of investigating the dimensions of environmental impacts. A number of human interferences for settlement and adventure tourism development have triggered the man-induced denudation in the region which comes in its threshold with the addition of bituminous road in the cultural landscape facilitating the Land Rover tourism. The effort to build concrete walls across the steep slopes may be a temporary solution but disaster in the long run could not be prevented. Under such circumstance, the level of community understanding on the anthropogenic causes of hazards and disasters is considered as the yardstick and interviews have been conducted to assess the awareness and preparedness to combat the causalities relating to adventure tourism promotion. Literacy level of the population has been given prime importance to identify the target group on developing preparedness. The changing literacy (Figure 8) and employment status (Figure 9) of the Singalila forest people during the last two decades are vital in the context of implementing awareness and preparedness programmes. The focus groups have been constituted deliberately ensuring the participation of porter and guides to understand the level of preparedness if any disaster takes place.

Further an open ended questionnaire is used for the household survey in both India and Nepal villages to detect the changing way of life and perception of the impacts on the development of trekking as well as Land Rover tourism. In consideration with the introduction of both hard and soft adventure tourism, the issues concerning ecological and economic sustainabilities have been identified through FGDs. From Figure 9, it is evident that despite the trekking and Land Rover tourism activities of the region, unemployment has increased between 2001 and 2011. Diversification of adventure tourism activities with introduction of newer types of adventure tourism products may be one of its remedies.

A number of recommendations have been derived in FGDs in this context. It also provides the platform for community involvement in suggesting geoconversional measures to combat the environmental impacts arising from adventure tourism development.

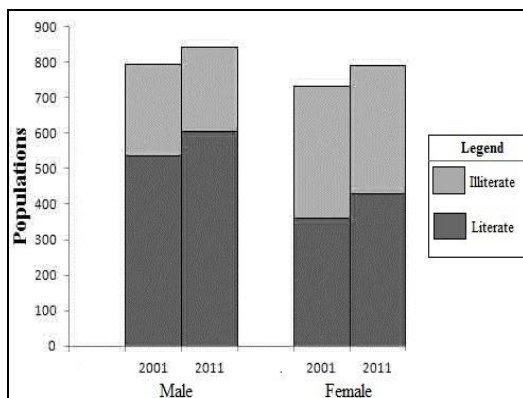


Figure 8. Literacy status of Singalila Forest Villages (Source: Census data of 2001 and 2011)

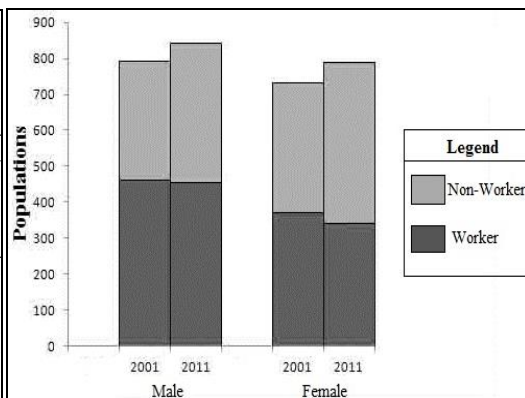


Figure 9. Employment status of Singalila Forest Villages (Source: Census data of 2001 and 2011)

RESULTS DISCUSSIONS

Sandakaphu is famous for the opportunity of Land Rover adventure, which is not available elsewhere in India. Land Rover is a six seater heritage vehicle which is running since British period prior to independence of India on this route as the lifeline of the communities settled in high altitude areas. Field survey reveals that 43 Land Rovers are presently registered in the office of Land Rover Association of Sandakaphu which has been affiliated to operate the Land Rover adventure in the region, which is an international border area between India and Nepal. The road at present is reconstructed by SSB (*Shastra Seema Bal*), a military organization of the Republic of India guarding Indo-Nepal border. Due to Indo-Nepal historical friendship treaty of 1950, the citizens of both the countries can move and stay in the territory of both the countries without having formal visa and passport for earning their livelihoods. It is revealed that though the office of the Land Rover Association is located in India side, the maximum number of drivers being deputed by this organization are the Nepalese. Among the 43 Land Rovers registered, 26 Land Rovers are however owned by the Indian citizens.

Table 3. Accommodation infrastructure for trekkers and travelers (Data source: Field Survey, 2018-2019)

Indian Side		Nepal Side	
Halt Stations	No. of Hotel (Total Beds)	Halt Stations	No. of Hotel (Total Beds)
Manebhangyang	7(350)	Chitrey	1(22)
Meghma	1 (32)	Lamedhura	3 (33)
Tonglu	2 (75)	Meghama	4 (127)
Gahribus	1 (48)	Tumling	7 (293)
Bikhebhanyang	2 (35)	Gahribus	3 (112)
Sandakaphu	2 (146)	Kaiyakatta	2 (48)
Molley	1 (50)	Kalipokhri	8 (250)
Sabarkum	1(14)	Sandakaphu	2 (200)
Phalut	1 (70)		
Gorkhey	5 (150)		
Sammanden	2 (103)		
Rammam	4 (100)		
Gurdum	1(27)		
SiriKhola	6(200)		
Total	36(1400)	Total	30(1085)

The normal tendency of the vehicles operated by the Nepalese drivers is to accommodate its passengers in Nepal side villages on route and under such circumference the earning from Land Rover tourism benefits Nepal more than India instead India has to bear the road maintenance cost along with the all adverse environmental impacts of Land Rover tourism against an earnings of Rs 100 in Indian currency per Land Rover trip that has been collected by forest office of Singalila National Park at Manebhanjyang. Table 3 represents the distribution of accommodation units in both Nepal and Indian villages (Figure 10) to reveal the division of benefits in this context.

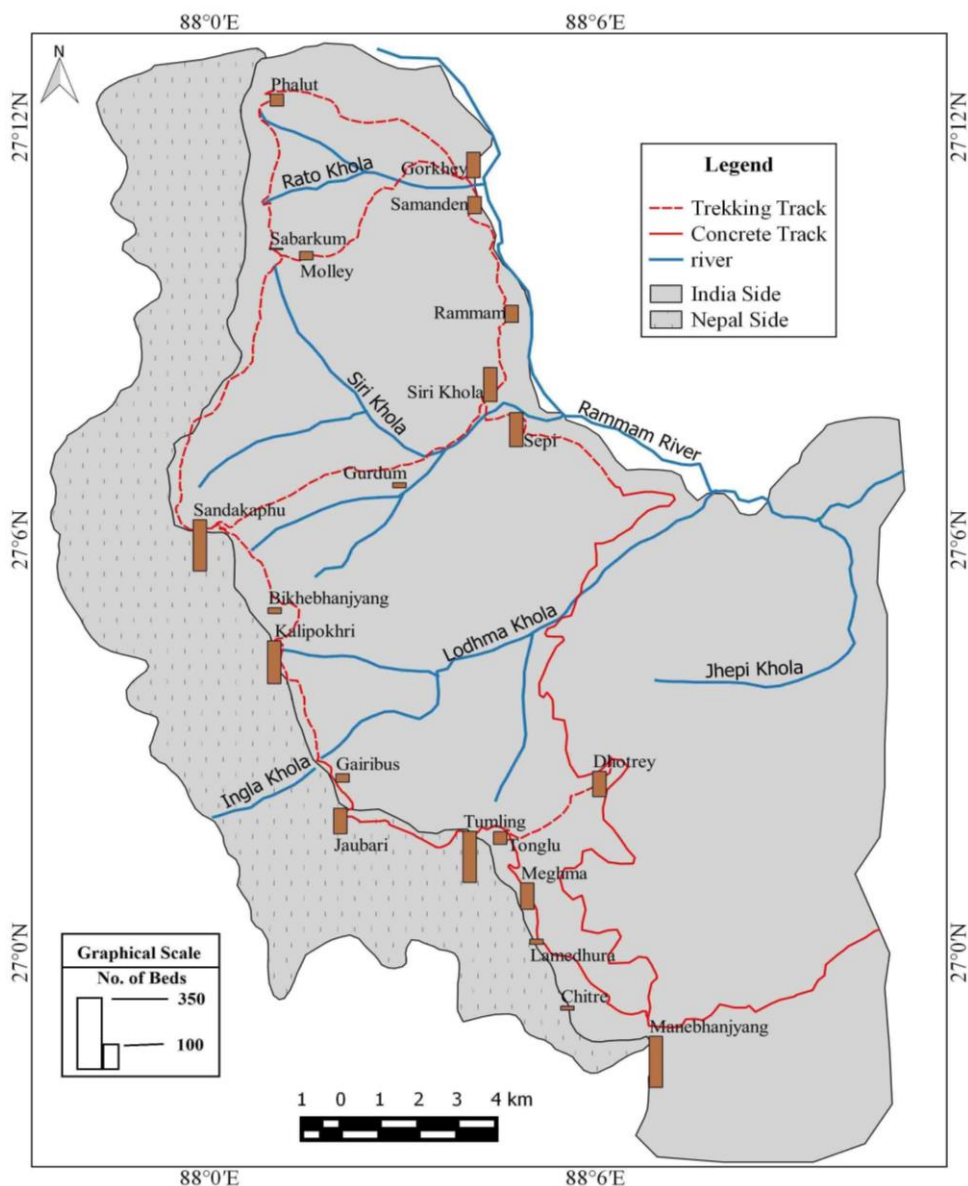


Figure 10. Distribution of accommodation facilities in Southern Singalila trekking corridor

A number of relevant issues have been put forwarded for the perception survey of the host population (Table 4), the response of which are subjected to Chi-Square test on 5% level of agreement while conducting the FGDs. The total population in Singalila forest (India part) according to 2011 census was 1632, among which 10% has been sampled and total 164 (male-114 female-50) population was involved in FGDs conducted in different Indian villages during 2018-19 (from October to March) on the trek route. The first objective was to study whether there is any significant level of difference between different age groups regarding the perception of impacts in the context of trekking and tourism development. A general hypothesis is that there is conflict between young and aged population in welcoming the impact of tourism activities. The Chi-square test reveals that this hypothesis would not be accepted for Southern Singalila range trekking route. There found no conflict between different age groups on this issue as the null hypothesis is accepted (Table 4). The next popular hypothesis is that tourism development is welcomed by the section of the host population who are educated and skilled to serve the visitors while the illiterate and little educated section of the society could not relate themselves with the expansion of this sector from the standpoint of obtaining benefits. This hypothesis is also rejected for the study area on 5% significance level as the null hypothesis is accepted (Table 4).

Further the responses of stakeholders and non-stakeholders on trekking–tourism benefits have been taken into consideration with hypothesis that there is no significant difference between workers in tourism sector and those who earn livelihood without any connection with tourism while welcoming the tourism benefits. Finally the issues on conflict between the interest of trekking entrepreneurs and Land Rover operators in the same route have been dealt with. The hypothesis that there is no conflict between trekking and Land-Rover tourism in the study region has been rejected.

Table 4. Perception analysis of the stakeholders (Data source: by the authors, field survey, 2018-2019)

Relevant Issues	Trekking and Tourism Development			Chi-Square Value	Remarks
	Agree (%)	Disagree (%)	Unsure (%)		
Level of welcoming tourism (n=164)					
Young (18-30 years)	18.90%	16.46%		2.93	Accepted
Mature (30-60years)	19.51%	28.04%	-		
Old (above 60 years)	4.87%	12.19%	-		
Welcoming tourism in relation to literacy and education (n=164)					
Graduated or above	9.75%	4.87%	9.75(%)	2.6406	Accepted
Educated upto school level	13.41%	10.36%	8.53(%)		
Illiterate	16.46%	12.19%	14.63(%)		
Agreement status on increase in quality of life among stakeholder and non-stakeholder (n=164)					
Employed in tourism sector	21.34%	11.58%	10.36(%)	3.29	Accepted
Other Workers	18.29%	18.90%	19.51(%)		
Land-Rover Tourism affecting trekking (n=164)					
Land-Rover stakeholders	12.20%	14.63%	6.10%	10.89	Rejected
Trekking stakeholders	9.75%	37.80%	19.52%		

Community involvement is a vital aspect in managing resource and infrastructure for sustainable geotourism implementation (Hakim & Soemarno, 2017). Availability of a number of geosites within a vulnerable geographical area generates possible threats for disasters, particularly landslides that could be addressed by adopting site management techniques involving the community under the umbrella of sustainable tourism

(Chakrabarty & Mandal, 2018). A questionnaire survey has been conducted to evaluate the positive and negative impacts of tourism incorporating the Nepal side villages along with the Indian villages which were previously subjected to FGDs. The responses have been recorded on a five point scale ranging from strongly agree (1) to strongly disagree (5) with emphasis on four positive and four negative issues (Table 5).

Maximum agreement on positive impact of tourism is derived on infrastructural development (46.34% strongly agreed while 23.78% agreed, i.e 70.12% in total) which is the direct effect of the metallization of road by SSB (*Shastra Sima Bal*), the Indian military organization deputed for Indo-Nepal border. More than half of the total respondents have been agreed on the positive impact of tourism on local economy. A steady revival of local culture particularly in cuisine, dance and music performances is also noticed. It is because the indigenous items presented for the satisfaction of visitors have been appreciated by the trekkers and travelers, particularly the foreigners.

However perception level in understanding such revival among the host population sampled is less (49.75%), which represents a need for an awareness campaign for developing momentum in this respect. Only 35.97% of the respondents are found agreed on positive change in quality of life instead they have accepted the benefits from infrastructure and economic development on their way of life. It is because that the level of expectation is very much increased among the host population, which is nothing but the direct impact of the demonstration effects arising from the interaction with trekkers and travelers, who are mostly the representatives of affluent urban societies in the poor mountain villages of southern Singalila trekking corridor.

Table 5. Perception of the host population on impact of tourism activities
(Data source: Prepared by the authors, field survey, 2018-2019)

Tourism and its Impact	Strongly Agree	Agree	Unsure	Disagree	Strongly Disagree
Infrastructural development of the area	46.34%	23.78%	15.24%	12.19%	2.43%
Increase of income and employment opportunities	31.09%	22.56%	24.39%	18.29%	3.66%
Revival of local culture	23.17%	36.58	12.80%	20.73%	6.70%
Positive change in the quality of Life	19.51%	16.46%	28.04%	25.60%	10.36%
Traffic congestion and vehicular pollution	5.48%	7.31%	12.19%	53.04%	21.95%
Conflict between trekking and Land Rover tourism operations	10.97%	23.17%	32.92%	24.39%	8.53%
Negative impact on forest and wildlife ecology	19.51%	35.36%	22.56%	12.19%	10.36%
Carrying capacity of the villages affected from accommodating tourists	10.97%	8.54%	23.17%	43.90%	7.31%

To study the negative effect of adventure tourism, the issues concerning environmental and economic sustainabilities have been taken into special consideration. Though there are a number of scholarly research on impact of trekking and tourism on forest and wildlife ecology, there is little awareness among the stakeholders in this context, as revealed from the perception survey. The researchers are the witness of illegal burning of forest woods in the fire places of the homestay units, who admit that more is the number of visitors, more is the requirement of forest cutting to satisfy them. Though there is surveillance from forest department, they know how to bypass the laws of the land utilizing their own connections and strategies. Though the Chi-square test accepts Land Rover-trekking conflict, only 32.22% respondents during questionnaire survey respondent on its negativity. It is not only for

the incorporation of Nepal side respondents who are much more benefited from Land Rover tourism but also represents the utility of adopting FGD as a methodology to analyze the ground realities in depth not being satisfied with the questionnaire survey outcomes. The apathy phase of host guest relationship of Doxey model (1975) prevails which represents a commercial relation between travelers and the villagers.

The benefits from such relation are among the factors responsible for their disagreement on carrying capacity problems. Carrying capacity assessment is essential to enumerate the stress on environment (Chakrabarty & Sadhukhan, 2018). A previous field study conducted during peak season reveals that the carrying capacity is very much affected and the situation of Sandakaphu, the destination settlement of the trek is alarming (Sadhukhan & Chakrabarty, 2018). The enormous pressure on its habitat is responsible for the extensive nature of mass wasting in the form of slumping and sliding with depletion of most of the local springs since the perennial nature of water table is affected (Samanta, 2018). However the host population is still not annoyed due to commercial attainment from trekkers and travelers. To combat such negative consequences from tourism, a policy of rational management with respect to environment may be ideal (Marszalek, 2018). There is fortunately, no serious traffic related issues in the area that is reflected from the responses registered on traffic congestion and vehicular pollution. From FGDs and questionnaire surveys a spectrum on the scope of promoting activity based adventure tourism has been derived (Figure 11), which may be very useful for adventure tourism extension in the region.

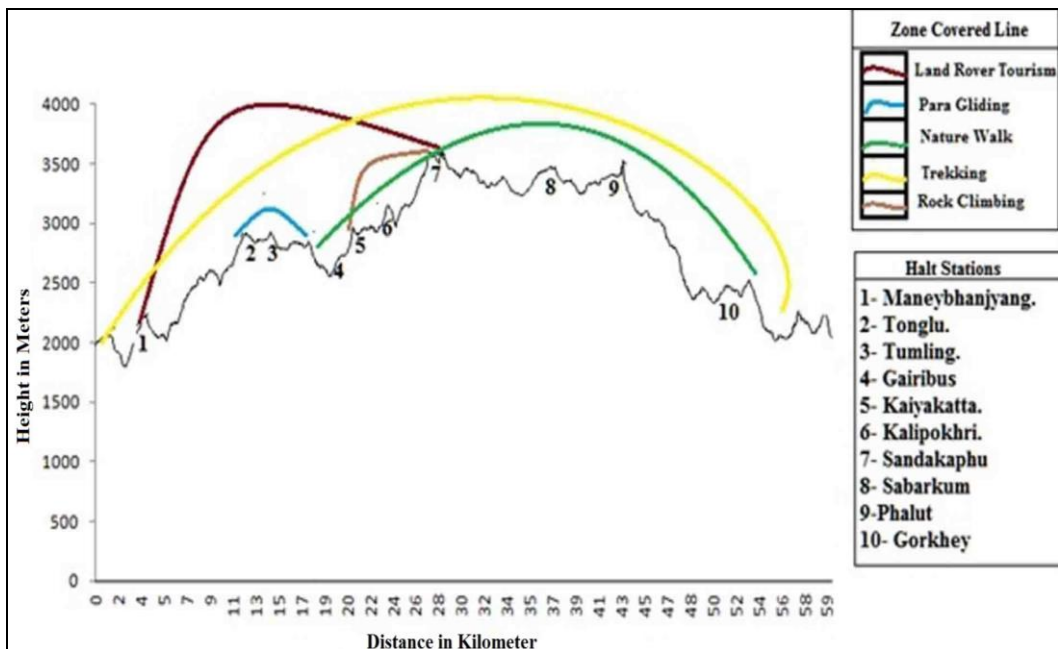


Figure 11. Cognition on adventure tourism spectrum (Source: FGD outcomes)

With such cognitive zonation for the promotion of adventure tourism, the stretches of vulnerable tracks are also identified. The rise from Kaiyakatta to Sandakaphu (Figure 11) is not only the most difficult part of the trek but also most vulnerable from the standpoint of geomorphic hazards. The expert drivers of Land Rover only agree to drive in this phase

only when weather is clear and sunny. The slope gradient between Sandakaphu and Phalut (Figure 11.) is less but due to the nature of rocks, the road maintenance is very difficult. This is why Land Rover journey usually ends at Sandakaphu.

Further the road is not motorable when it is covered with snow, which is located above 3500 meter from sea level. The stretch from Phalut to Gorkhey is the trek route identified with much more adventure tourism potentials which is yet to be explore.

CONCLUSION

Singalila forest is a paradise for adventure seekers, who could avail a number of options to reach at the apex of the satisfaction level while traveling the region. There is ample scope of introducing newer types of adventure tourism in the region in consultancy and active participation of local people as revealed from the study who are mostly literate and aware on the expanding tourism economy as well as necessity of their cultural survival. Nature walk, for example, is proposed to increase the extent of stay of the trekkers at the trekkers' hut of respective villages availing them opportunity to enjoy the outstanding scenic beauty of the surroundings. As the presence of local guides are mandatory for such nature walk for security reason, it may provide additional income and opportunities for the community. Such guides however should be trained to protect the travelers from wildlife and accidents.

For the geotourists specifically, they would be the source of indigenous knowledge acting as information providers on landscape ecology with special reference to human adaption in the lap of nature (Rokenes et al., 2015). In this context it is noteworthy to mention that mountain biking could never be recommended because of its adverse environmental impacts, both on nature and culture for which it has been already abandoned in many places of the world. In the sphere of sports tourism, marathon competition in relatively less slope gradient sections could be organized using the facility of metal road since high altitude running is recognize as one of the recent most adventure tourism products. Bird watching and expedition for Rhododendron may be other sustainable options. The geomorphosites of the region like mountain peaks, cascades, folds, various features of weathering etc provides the ample scope of symbiosis between geotourism and existing trekking opportunities along with Land Rover safari. Considering the whole spectrum of hard and soft adventure tourism (Pomfret, 2006), it may be concluded that attraction of geomorphosites could contribute to a lot in strengthening the soft adventure tourism sector in which risk is comparatively less and thereby considered more sustainable.

With the increase in the number of visitors in recent years, the threat on extension of the evil effects of adventure tourism has increased and by concentrating on the educative aspects of geotourism, it is necessary to diversify the future tourism activities in the region assuring ecological, economic and social sustainabilities.

Acknowledgement

The authors wish to acknowledge Dr. S. K. Samanta of West Bengal Education Service, who provided maps and valuable guidance to conduct the ethnographic surveys.

REFERENCES

- Atanga, R. A. (2019). Stakeholder views on sustainable community-based ecotourism: A case of the Paga Crocodile ponds on Ghana. *Geojournal of Tourism and Geosites*, 25 (2), 321-333.
- Babbie, E. (2011). The basic of social research. Fifthth Edition. USA, Wadsworth Change Learning.

- Beedie, P. & Hudson, S. (2003): Emergence of mountain-based adventure tourism. *Annals of Tourism Research*, 30(3), 625-643.
- Cappucci, M. (2016). Indigenous tourism in the Amazon region of Suriname: actions to preserve authenticity and natural resources. *GeoJournal of Tourism and Geosites*, 1(17), 47-56.
- Chakrabarty, P. & Mandal, R. (2018). Geotourism mapping for sustainability: A basin oriented approach. *GeoJournal of Tourism and Geosites*, 21 (1), 174-185.
- Chakrabarty, P. & Sadhukhan, S.K. (2018). Trekking and geotourism: A symbiosis in case of Goeche La trek route of West Sikkim in India. *GeoJournal of Tourism and Geosites*, vol 22 (3), 848-860.
- Christiansen, D. (1990). Adventure tourism: In adventure education, J miles and S. Priest edition, State Collage PA: Venture Publishing, 433-441.
- Dar, H. (2014). Potential and problems of adventure tourism: A study of Kashmir Valley. Abhinav International Monthly Refereed *Journal of Research in Management & techonology*, 3 (9), pp 77-83.
- Doxey, G.V. (1975). A causation theory of visitor-resident irritants: Methodology and research inferences. *Travel and Tourism Research Associations sixth annual Conference Proceedings*. pp 195-198.
- Gyimothy, S. & Mykletun J. R. (2004). Play in adventure tourism the case study of Arctic trekking. *Annals of Tourism Research*, 31 (4), 855-878.
- Hakim, L. & Soemarno, M. (2017). Biodiversity conservation, community development and geotourism development in Bromo-Tengger-Semeru-Arjuno Biosphere Reserve, East Java. *GeoJournal of Tourism and Geosites*, 20 (2), 220-230.
- Hamilton-Smith, E. (1993). In the Australian bush: Some reflections on serious lesiure. *World Recreatopn and Leisure*, 35 (1), 10 -13.
- Kaplan, M. (1975). *Lesiure: Theory and Policy*, New York, John Wiley.
- Kapur, A. (2010). *Vulnerable India: A geographical study of Disasters*, New Delhi, SAGE Publication India Put Ltd. pp 72-73.
- Lama, B. B. (2009). *The story of Darjeeling*. Dowhill, Kurseong. Nilima Yonzone Lama Publications.
- Marszalek, L. (2018). Importance of environmental conditions for the development of trourism in the Drawsko Landscape Park (Poland). *GeoJournal of Tourism and Geosites*, 21(1), 39-48.
- Maslow, A. (1970). *Motivation and personality*, New York, Harper and Row.
- Ollier, C.D. (1979). *Weathering*, London. E.L.B.S. Publications.
- Page, J. S., Bentley, A. T. & Walker L. (2003). Scoping the nature and extent of adventure tourism operations in Scotland: How safe are they? *Tourism Management*, 26, 381-397.
- Pearce, D.G (1979). Towards a Geography of Tourism, *Annals of Tourism Research*, 6, 245-272.
- Pomfret, G. (2006). Mountaineering adventure tourists: A conceptual framework for research, *Tourism Management*, 27, 113-123.
- Rokenes, A., Schumann, S. & Rose, J. (2015). The art of guiding in nature-based adventure tourism- How guides can create client value and positive expriences on mountain bike and backcountry ski tours. *Scandinavian Journal of Hospitality and Tourism*, 15 (1), 62-82.
- Sadhukhan, S. K. & Chakrabarty, P. (2018). Application of geospatial technology for management of trekking in mountainous environment: A case study of Darjeeling-Sandakaphu route, West Bengal. *Indian Journal of Spatial Science*, 9 (1), 85-90.
- Samanta, S. K. (2018). Geomorphology of the Southern Singalila range. Kolkata, Rhito Prakashan, 77.
- Stebbins, R.A. (1982). Serious Leisure: A conceptual statement, *The Pacific Sociological Review*, 25(2), 251-272.
- Swarbrooke, J., Beard, C., Leckie, S. & Pomfret, G. (2003): *Adventure Tourism: The new frontier*. Oxford, Butterworth Heinemann.
- Wadia, D.N. (1963). The Himalaya Mountains: Their age, origin and sub-crustal relations, Meghnad Saha memorial lecture, New Delhi, *National Institute of Sciences of India*.
- Weber, K. (2001): Outdoor adventure tourism: A review of research approaches, *Annals of Tourism Research*, 28 (2), 360-377.
- Zarinath M. K. & Siti, S. S. (2009). A web-based requirements elicitation tool using focus group discussion in supporting computer-supported collaborative learning requirements development. *International Journal of teh Computer, the Internet and Management*, 17 (2), 1-8.
- ***Census of India (2011). District Census Handbook Darjeeling, West Bengal, Directorate of Census operations West Bengal, Series 20, Part xii-B.
- ***Census Of India (2001). http://censusindia.gov.in/DigitalLibrary/Archive_home.aspx.

Submitted:
27.07.2019

Revised:
18.11.2019

Accepted and published online
20.11.2019

GeoJournal of Tourism and Geosites

Year XII, no. 3, vol. 26, 2019

**ISSN 2065-1198
E-ISSN 2065-0817**

