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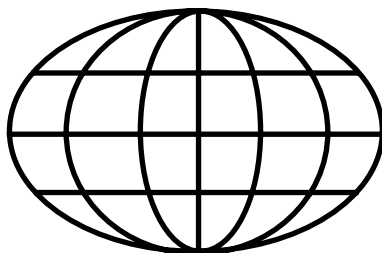IM. BRONISŁAWA CZECHA W KRAKOWIE

FOLIA TURISTICA

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Special Edition:
"The Master Classes"

**(Published on the 35th Anniversary of the Tourism
and Recreation Faculty at the University School
of Physical Education in Kraków)**

Edited by Wieslaw Alejziak

KRAKÓW 2011

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TO THE READER

It is my great pleasure to hand over another, decidedly different, special issue of "Folia Turistica." This two-volume issue (published separately in Polish and in English) has been prepared for the 35ᵗʰ anniversary of the Tourism and Recreation Faculty at the learning institution which has published our journal since its inception – The University School of Physical Education in Krakow.[1] The creation of this faculty also began our university's process of educating students with majors in Tourism and Recreation, which, we should stress, mobilized Poland's second MA degree program in this field, an endeavor which has successfully continued to this day. We have decided to ring in this anniversary with a publishing project that is unique even by international standards – the preparation of a special edition of our basic journal. To this end, we invited eight outstanding foreign tourism researchers to take part, all of whom decided to publish some of their most recent research herein. Apart from these undisputed academic authorities, who enjoy the recognition of tourism scholars around the world, we have also invited (through the normal article reviewing procedure) eight top Polish researchers to contribute to our project, those who are taking up issues in line with our foreign guests', or who have a particularly extensive scholarly output in a given field.

Thus came about this special issue of *Folia Turistica*, which will carry the subtitle "The Master Classes."[2] I am utterly convinced that each of the authors of the works found in the first section of this issue fully deserves to be called a "master" (eminent scholar) in world tourism research. I also hope

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[1] For the first few years (from 1990-1993) *Folia Turistica* was published together with the Państwowe Wydawnictwo Naukowe (the best Polish publisher at the time).

[2] We might take this opportunity to mention the difficulties in translating the Polish subtitle of the issue (*Z warsztatów Mistrzów*) into English. In Polish the expression *mistrz naukowy* (meaning outstanding academic authority) is deeply ingrained and often used, while the English equivalent ("master") has a somewhat different meaning, and is seldom used with reference to academics. The same goes for the term *warsztat naukowy* (academic technique), which in Polish refers to the entire competence of the academic researcher, while in English it has an entirely different, and narrower meaning. To render the idea and character of this special volume we decided on the subtitle "The Master Classes," which aptly renders the nature of the publication.

that soon we shall be able to say the same for all the Polish authors published herein (to my mind some of them already deserve this name). Apart from the translations of the masters' articles, they have also provided presentations of their work (found in the second part of the volume), which, to my mind, only go to confirm their brilliant technique and their scholarly maturity.

As the editor and initiator of the notion of publishing this anniversary issue of *Folia Turistica* (we should add that, apart from the above-mentioned anniversary, it is also the jubilee 25th issue of our journal), I would like to stress that this idea sprang from a few different aims. Apart from celebrating the anniversary itself, one of the main aims was to familiarize Polish readers and researchers with the most recent work by the world's finest tourism scholars. The majority (five) of the eight works written by the invited authors were specially prepared for our journal. Three articles are reprints (in the English version of the volume) and translations (in the Polish version) of works previously published in renowned journals. The first of these is the opening chapter in the recent two-volume book devoted in its entirety to a certain theory familiar to all tourism researchers, developed by one of our masters (who himself edited both volumes of this book), while the other two articles earlier appeared in top-rated academic periodicals (*Society* and *Annals of Tourism Research*).

In sum, the volume contains eighteen articles, grouped in three separate parts. The first contains the articles prepared by the masters, their brief academic biograms, and an outline of their contribution to the development of tourism research. The translation of the masters' articles and biograms have been rendered by Polish academics, who have also written their own separate articles, thematically corresponding with the works of "their" masters. These make up the second part of the volume. In the final part, which is linked to the central idea of this exceptional issue of *Folia Turistica* in a special way, there is a text dealing with the roles and undertakings of the titular "masters" in modern science, using the example of tourism research. The inspiration to write this text came from the remarkable achievements and careers of all the authors invited to participate in this publishing project. It would seem that this work could serve as a springboard for an interesting discussion on the subject, which should – to my mind – take place among people engaged in the study. There is also a special attachment to the article, containing statements by forefront Polish and foreign tourism researchers, who have been invited by the authors of article to give their opinion on a few key issues, such as: changes taking place in contemporary scholarship, and the shifts these cause in the perception of the roles and undertakings of the "masters," their efforts to improve the quality of tourism research and publications, improvement of methodology,

exploring new directions in research, progress in academic personnel (especially young tourism researchers), integration (international inclusive) of the whole community of tourism scholars, academic ethics, and so forth.

I hope that the reader will enjoy this somewhat unconventional undertaking. We ought to add that it is the first issue of our journal to appear in English as well. Two factors led us to take such a step. The first is the fact that an English-language publication of *Folia Turistica*, combined with the publication of so many outstanding foreign names, should mark out a "Polish presence" in the international arena of tourism research (something which Polish researchers seldom manage to achieve, regrettably), and promote our journal abroad. The second factor concerns the further development of *Folia Turistica*. This issue may indeed be the first step toward turning it into an English-language or bilingual publication. We are very interested to hear what readers think of the idea, and in particular, potential authors of future academic works to be published in forthcoming issues of "Folia Turistica."

There is one more aspect and important aim of this project I would like to underline: it gave a large group of (mostly younger) Polish researchers direct contact with real masters of world research on tourism, with figures they had heretofore known only through the literature. For all of us (writing on behalf of the Polish project participants) this was surely a very valuable experience, which will undoubtedly "pay off" in the future in an even more improved quality of our research and publications.

It remains to wish you a pleasant read and a great deal of academic inspiration, which is surely provided by this special anniversary of our journal. I invite one and all to participate and to publish in the pages of our journal.

Wiesław Alejziak

PART I

FROM THE WORK OF EMINENT INTERNATIONAL SCHOLARS IN TOURISM STUDIES

THE CHANGING FACES
OF CONTEMPORARY TOURISM

*Erik Cohen**

Abstract: Tourism, a domain of considerable importance in the contemporary world, has long been overlooked by social scientists, but has recently become a field attracting a growing body of research. In sociology, the relation between tourism and modernity at first constituted the issue of principal interest, the discourse focusing on the extent to which modern Western tourists seek authentic experiences on their trip. The article[1] discusses the changes in the terms of the discourse, contingent upon the growing similarity of the world in the wake of globalization, the emergence of the "post-tourist," and the diversification in the composition of tourists, with the growth in the number of travelers from non-Western countries. The question of the limits of the future expansion of the tourist system is raised in conclusion.

Keywords: tourism, social change, globalization, authenticity.

Tourism as a Topic of Social Research

Remember the camera totting, cigar chomping, gross American tourist, stumping the European hunting grounds half a century ago? Comical, he was a common butt of jokes, aimed at his boorishness and superficiality ("An American has done Rome in half a day; on leaving at the airport he said to his wife: 'A wonderful place this Rome; I could spend a whole day here!'"). Going into the elevator to the Sistine Chapel in 1965, I overheard one of those American tourists complain: "A scandal! To charge a dollar for a church!" The American tourist became the icon of mass tourism of the post-war age – a tourism, which was commonly perceived as exogenous to "real" life, lacking in depth and seriousness, and unworthy or serious intellectual or scientific concern. Few social scientists at the time realized that, though tourists might be comical, tourism is a serious business.

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Much changed in the intervening half-century. The iconic "American tourist" is long gone. His place was taken by a medley of travelers from all the continents, varying considerably in the degree of their sophistication, their motivations, mode of travel, and in their particular pursuits. In the absence of a dominant prototype, the stereotype of "the tourist" has been diffracted into many, more specific ones, of particular nationalities or travel styles. Tourism became recognized as a major domain of contemporary life, a huge international industry, reaching out into ever more remote corners of the world, and preparing to reach into space. Rather than an exogenous force, the tourist industry came to be perceived as a major agent in processes of environmental, social and cultural change, especially in many countries of the non-Western parts of the world.

Social scientists were somewhat belatedly drawn to the study of tourism, but in the last three decades tourism became a respected specialty in sociology, anthropology, geography, political science, economics and some other disciplines. Even philosophers and theologians began recently to show interest in the deeper, spiritual meaning of tourism. Sub-specialties, like the study of backpackers or of tourist arts, began to appear. Close to a hundred journals, from many countries, are presently devoted to the field. Rather than either glorifying or denigrating tourism, social scientists study its various manifestations, their dynamics, consequences and the conditions for their sustainability, and seek to determine the distribution of their benefits and costs for the life, culture and environment of the people at the destinations. There was also much applied research on tourism, directly or indirectly industry driven, but there is also a good deal of critical research, devoted to the elucidation of the problematic effects of the industry, rather than to the increase of its profits. Current research struggles to deal with the processes of transformation, which contemporary tourism is undergoing under the impact of some major recent historical events and global socio-economic forces, particularly, the spreading economic and cultural globalization, the opening up of the post-communist countries, and the emergence of a newly prosperous middle class in some parts of the so called "developing" and "post-communist" world.

Social Change and Tourism

Tourism was a modern Western cultural project The core of modern tourism lies in the Western world; the industry was developed, owned and managed by Westerners; modern tourists were predominantly Westerner; Westerners shaped the principal tourist routes and destinations, styles of

travel, of accommodations and of auxiliary services. The sociological investigation of tourism was from the outset dominated by the question of the relationship between tourism and modernity. Tourism has at first been deprecated by intellectuals, and epitomized by the social historian, Daniel Boorstin, in his biting critique of American society, *The Image*, as "the lost art of travel." Ironically, however, that essay, more than any other, triggered the principal sociological controversy on the nature of modern tourism.

The principal bone of contention was the question, what makes moderns travel? In a challenge to Boorstin's deprecation of the tourist, Dean MacCannell proposed in the early 1970s, that moderns depart on sightseeing tours in a quest for authenticity, which they miss in their own phony, alienated world. Rather than comical, their serious quest is tragically frustrated by the locals, who deceptively stage their own authenticity, thus preventing the tourists to experience the "real thing". The quest for authenticity was thus posited as the principal, culturally approved motive for modern travel.

MacCannell's thesis was highly influential in the formation of the sociological discourse on tourism, which continues, in various permutations to this day. However, recent developments in tourism make the issue of "authenticity," for various reasons, increasingly less relevant. Perhaps the most obvious reason is that the Western domination of the tourist system is in the contemporary world increasingly challenged under the impact of a rapidly growing number of travelers from non-Western countries. These come principally from the wealthy Middle East, and from Asia, where the new middle classes of Japan, China, India, South Korea and Thailand developed a taste for international travel.

Students of tourism have for long been oblivious to the significance of this rising trend for the sociological analysis of tourism. We know little about the motivations and desires of the growing numbers of non-Western tourists; but it is reasonable to assume, that they did not share the Westerners' "art of travel" in the past; nor are they necessarily impelled by a quest for "authenticity" at present. The question, what are the culturally justified motives for travel of non-Western travelers, and how these help to fashion their style of travel, and their choices of destinations and activities, is one of the major issues, presently facing the sociological study of tourism.

However, even in the contemporary West, tourism motivations are in a process of flux. There exists a widespread perception, that under the impact of globalization, the natural and cultural diversity of the world is decreasing. Post-modern philosophers, like Jean Baudrillard, asserted that the contemporary world is dominated by "simulacra," without originals. As a consequence of past imperialist expansion, globalization and the post-modern hybridization of cultures, no authentic sights allegedly remain to be

discovered or admired by tourists. True enough, the stagnation, revealed by the opening up of the post-communist world, has facilitated the survival of little touched natural sites and cultural life ways, to which Western tourists soon flocked, in order to explore their "authenticity". But even these are rapidly disappearing, under the impact of brutal capitalistic development and adaptation of Western life styles in those countries.

Remarkably, rather than contracting under the impact of the growing sameness of the world, Western tourism continues to expand, and not only into the post-communist world. This may be superficially accounted for by the growing prosperity, which leaves Western upper and middle classes with ever more disposable income. But this does not explain why they should spend their money on travel, rather than on other activities. The question then arises: why should an apparently ever less interesting world attracts ever more travelers?

One suggested explanation is that a major transformation may be underway in the West, from the modern, to the post-modern tourist, or "post-tourist". While this is certainly not an all-embracing process, it may have wide-ranging effects on the nature of contemporary tourism. Resigned to the futility of a quest for authenticity in the contemporary world, the "post-tourist," instead of being concerned with the origins of supposedly "real" attractions, ironically or playfully prefers to enjoy the surfaces of often manifestly inauthentic ones. Instead in pursuing different experiences, he may choose to visit places which offer familiar ones, but in a greater variety, of a higher quality, in a more agreeable ambience (or at a lower price), than those available at home. Sheer fun and enjoyment became, in this view, a culturally approved, sufficient reason for travel.

"Post-tourism" thus tones down the "extraordinariness," which used to be the distinguishing mark of modern tourism – a relatively rare break, even reversal, of everyday life. Even as it increases in importance, contemporary tourism is becoming de-differentiated, and losing its distinctiveness, merging seamlessly with ordinary, everyday leisure and entertainment. It is becoming increasingly difficult, if not meaningless, to ask whether a given activity is a touristic one, or just plain leisure.

The growing prominence of fun and enjoyment, rather than "authenticity," as the principal motive for travel, may help to explain the remarkable growth in the number, size and technological sophistication of "contrived" or "man-made" attractions, which have risen in popularity, even as the quality of many established "natural" attractions declined in recent decades. The Disney Worlds obviously constitute the prototype of such "contrived " attractions, but a wide variety of other theme parks, entertainment centers, large-scale shows and festival events have cropped up in many localities around the world.

The emergence of such popular "contrived" establishments had a paradoxical effect on many long-standing destinations. Under the impact of globalizing forces, their distinctive "placeness," a major factor of their attractiveness in the past, is rapidly diminishing. However, as new, contrived attractions, unrelated to their specific ambience, are implanted in them, they acquire a new kind of reputation, and in some cases – as in the case of Las Vegas – an artificially induced "placeness".

Under the impact of these developments, the tenor of the discourse on authenticity has recently changed. The earlier preoccupation with the veracity of the "objective" authenticity of attractions has been replaced by a growing concern with the tourists' experiences of "subjective" authenticity on their trip. These, according to some authors, may, at their highest point, possess an "existential" quality, resembling that found at the climax of intense erotic or religious experiences. While in the past researchers have tacitly supposed that intensive experiences could be found primarily in the presence of overwhelming sights, such as magnificent mountains or supreme works of art, contemporary researchers believe, that such experiences can be independent of the nature of the tourist's surroundings, and may occur even in blatantly inauthentic situations, such as hilarious beach parties or simulated space rides.

The quest for intense, make-believe experiences of the fantastic, which are available in contrived attractions, is in the "post-modern" world gaining preference over the quest for authenticity in "natural" attractions. "Fantasy" is becoming one of the leading motives for travel: the last resort of radical difference in an otherwise increasingly monotonous, less attractive world.

The trend to prefer the excitement of make-believe fantasy over the "real", however, is not an all-embracing one, and in fact runs into resistance in various ways in the contemporary world. There are those, like some (though ever fewer) backpackers, who – spurning the established tourist routes – seek out ever more remote, little accessible locations, to experience what to them may appear as the last remnants of an authentic way of life or untouched nature. Paradoxically, however, they thereby unwittingly serve as the spearhead of an expanding tourist system. There are many "special interest" tourists, like bird-watchers, whale-watchers, fishing or yachting enthusiasts and followers in the steps of historical or literal figures. There are the increasing numbers of religious tourists, combining religious or spiritual pilgrimages with other touristic activities. There are the "extreme" tourists, who seek the thrill of danger in such exploits, as free rock climbing or unassisted polar crossing, and, most recently, space travel. Finally, there are those who find the mere pursuit of fun and enjoyment too shallow, and look for a more profound "meaning" on their trip, giving rise to new forms

of tourism, such as educational tours, participation in scientific expeditions, like archeological digs, or volunteering for work in different projects, like rural development, nature conservation, or humanitarian aid.

Contemporary tourism, is becoming increasingly diversified and segmented, and new specialties are constantly emerging. As it moves into the new millennium, the tourist industry faces a major new challenge: the prospect that space, presently the preserve of the privileged few adventurers, will become the principal direction of its future expansion

Conclusion

The rapid expansion of tourism is in the contemporary world raising some increasingly serious problems. The opportunistic character of the tourist industry is gobbling up and commodifying all varieties of travel, including, paradoxically, even those which have initially been conceived as an alternative to it. The principal example of this process is backpacking. Emerging from the counter-culture of the 1960s, and based on an ideology of opposition to conventional tourism, backpacking is increasingly incorporated into the mainstream tourist industry, in a process which could be dubbed as "from backpacking to back-packaging": specialized tourist enterprises are presently offering low-priced backpacking tours, featuring routes, destinations, accommodations and activities preferred by this kind of travelers. Another example is volunteering: if in an earlier time, travelers volunteered for certain activities, either owing to intrinsic interest, or as a means to gain a cheap holiday, volunteering recently became another branch of the tourist industry, with volunteers paying specialized tourist agencies for the privilege of doing unremunerated work at their chosen destination. "Untamed" travel, outside the scope of the tourist industry, is becoming an increasingly difficult proposition.

As the availability of potentially attractive, but as yet undeveloped destinations is rapidly diminishing, the very underdevelopment, or stagnation, of a country or region appears to become a potential tourist resource. At present, many governments and local authorities in the less developed parts of the world look at tourism as a panacea – while disregarding the often destructive environmental and cultural consequences of a sudden implantation of tourist enterprises into otherwise undeveloped destinations. The dire experience of "lost paradises," pristine areas destroyed by insensitive tourist development, in the Pacific islands, South East Asia and elsewhere, should serve as a warning against eager developers, who, by coveting the tourist dollar, frequently inflicted irreversible damage to sensitive environments and cultures.

While this is a problem on the local scale, a major problem is emerging on the global scale, namely the limits of tourist growth. It is a problem which tourism shares with the energy industry: the sheer growth in demand. As prosperity spreads in populous countries of the non-Western world, travel demand soars; according to some projections, about 100 million Chinese will annually travel abroad by the end of the present decade. They will be soon followed by tens of millions of tourists from India, Brazil and other rapidly developing countries, even as tourism from the West continues to grow. Current projections of future tourism indicate progressive growth in the coming decades. Though tourism is an elastic industry, able to absorb growing numbers by opening up new destinations, and creating novel attractions, the limits of bearing capacity of the most popular attractions are already being reached. And a point in time may come, when a further expansion of tourism may put unacceptable pressure on the available tourist resources on a global scale.

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A Brief Outline of the Academic Achievements of Erik Cohen and His Contribution to the Development of Tourism Research

Erik Cohen is the emeritus professor at the Department of Sociology and Social Anthropology at the Hebrew University (Jerusalem). Born in 1932 in Zagreb, Yugoslavia, he emigrated to Israel in 1949. From 1954 to 1961 he studied sociology (under the academic supervision of Samuel Eisenstadt), economics and philosophy at the Hebrew University. He has published extensively in the areas of collective settlements, urban studies, folk art and tourism. He carried out research in Israel, Peru, on the Pacific Islands and, since 1977, mostly in Thailand. His academic output includes over 180 articles and books, such as: *The Commercialized Crafts of Thailand* (Curzon and Univ. of Hawaii Press, 2000), *The Chinese Vegetarian Festival in Phuket* (Bangkok: White Lotus, 2001), *Contemporary Tourism: Diversity and Change* (Elsevier, 2004), *Israeli Backpackers and Their Society* (edited with Ch. Noy) (Albany NY: SUNY Press, 2005) and *Explorations in Thai Tourism* (Emerald, 2008). Since 1976, Cohen has served as a Sociology Editor of *Annals of Tourism Research*. He is also on the editorial boards of several other journals and vis a founding member of the International Academy for the Study of Tourism. Erik Cohen presently lives in Thailand and works on new topics, such as animals in tourism, medical tourism and tourism and disaster.

Erik Cohen is probably the first sociologist who started to devote most of his academic work to tourism once he had fully noticed the social significance of this phenomenon. The framework of his approach to the sociology of tourism was presented back in the early 1970s, in two key papers. In the first of these – a manifesto for a new discipline (*Towards a Sociology of International Tourism* (*Social Research*, 1972), he offered an approach to tourism, which he then further developed over the next 40 years.

According to his theory, the phenomenon of mass tourism emerges at the beginning of the 19th century, when Western societies started to develop a general interest in the world. Unfamiliarity and dissimilarity, formerly frightening, now began to be appreciated as an experience. The experience of novelty and strangeness, as against the daily experience of familiarity is proposed as the distinctive characteristic of tourism. People differ in their willingness to get to know new environments and to change their old habits. Cohen proposed four tourist roles across the continuum of possible combinations of novelty and familiarity and their corresponding four types of tourist experience, based on the extent of willingness to exposure to strangeness. He defined the first two roles as institutionalized (including "organized mass

tourists" and "individual mass tourists") and the latter two as non-institutionalized (which includes "the explorer" and "the drifter"). Institutionalized tourists are those who travel in an environmental bubble of their home environment, whereas non-institutionalized tourists are those who expose themselves to the strangeness of the host society. Contemporary mass tourism is highly institutionalized. Travelling became a standardized package tour sold as a finished product. It is supposed to create an illusion of real adventure and give a sense of novelty but without any discomfort or inconvenience.

The main aim of mass tourism is visiting tourist attractions; either genuine – that is attracting tourists due to their authentic, unique features – or artificially "contrived" for tourist purposes. According to Cohen, what is characteristic of mass tourism is a transformation of attractions – additional efforts to make the attractions ever more attractive, and standardization of services which leads to uniformity of experience and reduces the richness of local culture to stereotypes. Tourist guidebooks select and dictate what to see. As a result, the tourist's mind turns to spots of interests whereas the host country's wider context remains relatively unimportant. Countries become "interchangeable" because the tourist destination is not Greece, Spain or Morocco but "a beach." The differentiation of the tourist "enclaves" from the rest of the country leads to the social isolation of the tourists.

In the most frequently quoted article (after McCannell's *The Tourist*) about tourism in social sciences [*A Phenomenology of Tourist Experience*, in the journal *Sociology*, 1979] Cohen, referring to the works of anthropologists of religion, Mircea Eliade and Victor Turner, distinguished five phenomenological modes of tourist experience: recreational, diversionary, experiential, experimental and existential. Some of his later texts, based to a considerable extent on empirical work in Thailand, deal with the relationship between commercialization and such issues as authenticity, alternative tourism, tourist-oriented prostitution and tourist crafts. In recent years, Cohen has conducted series of case studies on a wide range of tourism-related trends and events in Thai society.

Cohen's early papers included important ideas that were further developed by other leading sociologists and anthropologists studying tourism: strangeness, authenticity, tourist attractions or the diversity of tourists, from package tour clients to backpackers.

(profile prepared by Krzysztof Podemski)

"TAKE ME TO THE HILTON": THE LANGUAGE OF TOURISM PARADIGM

Graham M.S. Dann*

Abstract: This paper[1] argues that a social scientific paradigm is an open-ended interpretive framework for understanding connoted meanings. As such, it is eclectic in nature comprising the most appropriate offerings drawn from diverse, though compatible, theoretical perspectives, and initially limited only by the conceptual boundaries of that paradigm. A socio-linguistic paradigm is explored for the light it can shed on contemporary tourism, and, more particularly, the ways whereby the latter is promoted. Illustrations are based on some award winning publicity featuring a well-known international hotel chain and how it goes about targeting messages at the businessman abroad. Here various readings of pictures and texts are provided, the understanding of which is enhanced through selective insights supplied by a number of commentators of different theoretical persuasions.

Keywords: the language of tourism, paradigm, promotion, semiotics, sociolinguistics.

Introduction

Following its etymological derivation (παρα – beyond, δεικνύμί – show) and insights supplied by a number of commentators, a social scientific paradigm may be defined as: A MULTI-THEORETICAL, OPEN-ENDED CONCEPTUAL FRAMEWORK, WHICH GOES BEYOND SENSATE REALITY TO THE REALM OF CONNOTED MEANING, IN ORDER TO PROVIDE

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[1] Revised version of a paper entitled "Take me to the Hilton: Tourism as Language – An Eclectic Multi-theoretical Paradigm" which was presented to the symposium on *Paradigms in Tourism Research*, held by the research committee on international tourism of the International Sociological Association, University of Jyväskylä, Finland, 4-7 July, 1996. Although never submitted for publication, the value of its reproduction here lies in providing the original socio-historical context of the language of tourism when it was first introduced into tourism studies. Since then, of course, a number of changes have taken place in the digitalisation of tourism promotion along with a greater democratisation of communication [Dann, 2005].

A PARTIAL INTERPRETIVE UNDERSTANDING OF THAT REALITY.[2]
From this definition it should be noted:

- Whereas some give the impression that paradigms and theories are co-
terminous [e.g., Ritzer, 1975], the position adopted here is that, more
often than not, any given theory is a subset of a paradigm, i.e., two or
more compatible theories constitute a paradigm. Thus the use of such
labels as "critical" and "constructivist" to designate a single theory can
be misleading, to the extent that "critical theory" and "constructivism"
are themselves multi-theoretical and hence paradigmatic.

- Theoretical pluralism often implies multi-disciplinarity, particularly
where boundaries between the social sciences and humanities are be-
coming increasingly fuzzy.

- Paradigms are theoretical starting points (*termini a quo*), rather than
endpoints (*termini ad quem*). In order for knowledge to progress, para-
digms are necessarily open-ended [Denzin, 1989, p. 36].

- Since paradigms go beyond first order sensate reality (cf Positivism,
Behaviourism) to second order meaning (motivation), interpretive un-
derstanding of that meaning is necessarily emic in nature. However,
in order to be generalizable, participant theory should be viewed in its
typicality, rather than in its idiosyncrasy – in its form, rather than in its
content.

- Nevertheless, interpretive understanding is never *complete* understand-
ing. The *truth* it provides is always *relative*, i.e., constructed by those
defining given situations. Paradigms thus offer *less* than belief systems
[Guba, 1990, pp. 9, 17]. They are *not* metaphysical worldviews grounded
in absolutes, but conceptual frameworks based on shifting meanings.

As regards certain paradigmatic issues [Guba, 1990, pp. 10-11], the
foregoing definition responds as follows:

Accommodation: As previously noted, in order to be included in the
same paradigm, theories must be *compatible*, if not in ideological terms
then at least in general aim. Thus a shared goal of understanding at
the level of meaning would render intra-paradigmatic theories com-
patible, whereas the inclusion of first order and second order theories
within the identical framework would violate this minimum criterion.
As a corollary, even rival interpretive theories can be accommodated in
the same paradigm provided they can achieve synthesis through dialec-
tical exchange. Less clear is the case where one theory attempts causal

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[2] As an interpretive framework it thus goes *beyond* first order reality to a second order
connoted system of meaning so as to *reveal* something additional about it that could not be
gauged from simple observation. However, such understanding can never be total since social
scientific knowledge by definition is always relative.

explanation while another essays interpretive understanding, since it is debatable whether or not the former exists on the same methodological continuum as the latter.

***Knowledge Accumulation*:** The notions of interpretive understanding and relative truth necessarily imply that no one theory or paradigm has all the answers. Within a given paradigm, however, several theories can synthetically combine towards a higher level of knowledge construction than would be obtained from the input of a single theory. Furthermore, the open-endedness of the paradigm itself, and hence the possibility of paradigm shift [Kuhn, 1962], is conducive to greater knowledge accumulation. More debatable is the question of whether cumulative knowledge is simply the summation of transferable case studies, or whether it should instead be generalizable knowledge that transcends temporal and spatial considerations.

***Values*:** The classical distinction between "value freedom" and "value commitment" applies not so much to choice of research topic as to the research act itself. Those who argue that research should be conducted objectively and neutrally (Positivist theories) are clearly at loggerheads with those who regard the investigator and the investigated in terms of trans-subjectivity (Constructivist theories) jointly engaged in a programme of ameliorative action (Critical theories). The domain of values is therefore another instance where paradigms may differ with respect to general aim, and consequently have insufficient grounds for accommodation.

Also worthy of note is the realisation that the definition of a paradigm offered here concurs with Ford's [1975, p. 12] contention that, 'all thought whether in everyday life, in science or in any other realm, is paradigmatic, that is to say that all thought is patterned on some mould.' It further agrees with her that paradigms comprise basic beliefs, figurations of facts, rules of reasonableness and kept knowledge [Ford, 1975, pp. 16-26], and that paradigms can be "broken out of" or transcended through "sociological imagination" [Ford, 1975, pp. 73-75; cf Denzin, 1989, p. 4; Kuhn, 1962, pp. 122-123; Mills, 1959; Popper, 1963, p. 56].

However, this definition disagrees with the claim of Guba [1990] and Ritzer [1975] that theories are quasi coterminous with specific paradigms. Rather it maintains that two or more theories are sub-sets of, and constitute, paradigms, and that, not only are paradigms multi-theoretical, they can even be multi-disciplinary in nature.[3]

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[3] By "multi-disciplinary" one is not merely thinking of cross-fertilisation within the social sciences [Dann and Cohen, 1991], but also outside the social sciences. In this respect, Denzin [1989, p. 46] introduces the term "blurred genres" to indicate that the boundaries between

Paradigms and Tourism Research

Relating the foregoing to tourism, Cohen [1979, p. 31] captures the essence of the above definition of paradigm when he observes:

> The complexity and heterogeneity of the field of tourism suggests that there is no point in searching for *the* theoretical approach to the study of tourism, just as there is no point in searching for *the* conceptualization of the tourist. Rather a *pluralistic* and even *eclectic* research strategy is advocated (emphasis added).

In other words, tourism research should draw on a *variety* of *compatible* theoretical offerings, in such a way that their *cumulative* insights can be brought to bear in an analogous fashion to a jigsaw, on what is "sociologically problematic" [Berger, 1963; Dann and Cohen, 1991, pp. 157, 161]. This "kaleidoscope" of understanding is yielded by *selectively* abstracting the most useful content from a *number* of *accommodatable* theories, while abandoning the conceptually barren.

Thus, for example, tourist motivation, (which is sufficiently problematic as to lie at the core of understanding the phenomenon of tourism), can be usefully explored by initially borrowing ideas from Weber and Schutz. These far from comprehensive insights can be subsequently developed by introducing the allied theoretical concepts of "alienation" (Marx, Habermas, Simmel), "commoditized play" (Baudrillard, postmodernism), "the quest for the sacred" (Durkheim, Eliade, Turner), and so on. One *begins* with an individual or combined approach (e.g., social action theory and/or phenomenology), and then enriches it *eclectically* by adding appropriate offerings drawn from within and without that perspective. In the process, the original paradigm is modified and enhanced.[4]

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the humanities and social sciences are increasingly overlapping. Interestingly, he identifies tourism as one area where social scientists are turning to "the points of view and methods of aesthetics, linguistics, semiotics, cultural history and literary criticism". Smart [1994, p. 150] makes a similar point when she states, 'As subject matter, theory and method have become increasingly matters of difference and disagreement so the prospect of a shared paradigm of consensus within the discipline of sociology has receded. Paralleling the social, cultural and political transformations it attempts to interpret and explain, sociology itself now appears decentred and pluralistic. Given the existence of a plurality of sociologies, differentiated on epistemological and cultural grounds, nineteenth century Western European arguments concerning the specificity of sociology appear deficient, if not irrelevant. Where the founding fathers in the discipline sought to radically differentiate sociology from the other social and human sciences, contemporary analysts have drawn attention to the blurring of disciplinary boundaries and the virtues, if not the necessity, of interdisciplinary work.'

[4] However, for an alternative view of paradigms of tourism research see Aramberri [2010].

A Sociolinguistic Paradigm of Tourism

Another instance of the foregoing trend, and the focus of the current presentation, is the attempt to treat tourism semiotically, that is to say, to place tourism initially within a socio-linguistic paradigm and to analyse it as a form of symbolic communication. Within such a conceptual framework, "the language of tourism" may be described as, "a structured, monological, multi-strategical and controlling way of communicating between often anonymous parental senders and readily identifiable childlike receivers." To this sentiment the following qualifications can be added: 'Through many registers, diverse media and all stages of a trip, the language of tourism transmits timeless, magical, euphoric and tautological messages which contain the circular expectations and experiences of tourists and tourism' [Dann, 1996, p. 249].

Without repeating the supporting arguments here, it can nevertheless be seen that, in assembling the above definition through a separate examination of the properties, techniques, media and registers of the language of tourism, it is not necessary or desirable to be limited to any single overarching theory. Instead, within a semiotic paradigm, it is possible to entertain a number of theoretical perspectives, ranging from Jakobson's functions of language to insights provided by an array of scholars, including *inter alia*: Adams, Allcock, Barthes, Boorstin, Boyer and Viallon, Bruner, Buck, Cazes, Cohen, Crick, Dufour, Gottlieb, Graburn, Hollinshead, Katriel, Krippendorf, Lanfant, Lowenthal, MacCannell, Nöth, Said, Selwyn, Thurot and Thurot, Tresse, Turner, Urbain, Urry and Uzzell. By no stretch of the imagination can these individual commentators be thought of as constituting a homogeneous theoretical group.[5] Yet, in a piecemeal fashion and from differing viewpoints, they collectively enhance the understanding of tourism as a process of communication.

Of course, if this writer were obliged to reveal his true feelings, he would have to admit that he is more partial to some approaches than he is to others. He is not really attracted to Structural Functionalism, for instance, according to which tourism is treated as an interlocking network integrating the needs of tourists into a vast centralised value system. Nor is he particularly enamoured with the tenets of Evolutionary Organicism, early Conflict Theory, or any grand theory, for that matter, which purports to have an all-embracing view of tourism. Rather, he is inclined to less ambitious approaches. He prefers the interpretive[6] to the explanatory, the qualitative to

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[5] Nevertheless, there is the happy realisation that several of these theorists belong to the research committee on international tourism of the International Sociological Association.

[6] In this regard, Smart [1994, p. 158] observes that, 'It is important to remember that difference and diversity exist not only in the social worlds sociology attempts to interpret and

the quantitative. These are his choices. That is what he means by eclecticism – taking what he perceives as good or useful, and leaving behind the conceptually bad and ugly. The selections of other theorists may be entirely different, and, provided that they can justify them, are worthy of respect.

However, since all paradigms are mental frameworks, a few words are necessary about the boundaries of the paradigm examined here. First, by considering tourism as language, it is believed that analysts are entitled to explore all forms of communication which are employed in *promoting* destinations, resorts, transportation, accommodation, sights, events, and so on, that is to say, those messages which are targeted at potential tourists and repeat visitors in a number of pre-trip situations. Whether this promotion is carried out by a package tour company, a national tourism organisation, a hotel, an airline or a local water sports operator, it still forms part of the discourse of tourism. Similarly, whether the promotion is channelled through brochures, travelogues, television, over the Internet, or via a combination of the above, it all forms part and parcel of the language of tourism. Only the medium of communication has changed.

Second, the act of promotion is couched in a vocabulary of motive, and, in the case of testimonial, satisfaction dressed up as motivation. The tense of the discourse is therefore, like advertising itself, in the future perfect or pluperfect, that is to say, the future is considered reflectively as if it had already taken place, either as projected action or in terms of repeating past action. The future as past is the promoted alternative to dissatisfaction with the present [Dann, 1993].

Third, the promotion may be verbal, pictorial, or a combination of both. While each possibility carries its own set of techniques, it may also be considered in linguistic terms. In stating the above, the view is taken that iconographic representations do not have semiotic autonomy [Lindekens, 1971]. They require an additional text for "anchorage" and "relay" [Barthes, 1984, pp. 38-41; Dann, 2004], i.e., most tourism advertising combines imagery with copy.

Fourth, once the message has been "successful" and tourists have been persuaded to partake of the promotional promises, the language of tourism carries over into the on-trip stage as a discourse of social control. Whether tourists are informed by notices *not* to spit, smoke, drink or bathe in the nude (and here Paul Theroux [1975] comes to mind with his wonderful collection of Indian "thou shalt not's"), or encouraged by a variety of media to visit a given site, take such and such a photograph, patronise the hotel

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understand but also within the discipline itself. To that extent the need is for an "interpretive" rather than a "legislative" internationalised sociology, one which attempts to offer a translation service between different cultures and communities.'

restaurant in preference to rival local establishments, or go on an excursion suggested by the tour representative, the idea is generally the same. Through a series of prescriptions and proscriptions, the touristic experience is ordered. The alternative amounts to chaos, environmental degradation, rampant DIY individualism, and loss of bottom line profit.

Finally, at the post-trip stage, returning tourists, via word-of-mouth communication, and the accompanying multi-sensory clutter of souvenirs, logos, luggage labels and slides, extend the language of tourism to the home situation. Now they, rather than functionaries of the industry, become senders of messages – the major difference being that, unlike the pre-trip stage, such messages can dissuade as well as persuade others to engage in like experiences.

Naturally enough, some sociological perspectives are more compatible than others with this socio-linguistic paradigm, and no apology is tendered for cherry picking their most useful ingredients. Symbolic Interactionism [Colton, 1987; Dann and Cohen, 1991, pp. 165-167; Denzin, 1989], for example, is highly germane to such a framework. With its emphasis on exchange of meanings, definitions of situations, negotiation of roles and the process of learning, Symbolic Interactionism is particularly helpful in understanding that much of tourism communication is successful to the extent that it places the tourist in the role of child [Amirou, 1994; Dann, 1989]. Such a strategy is most effective in transmitting messages that are based on the respective R, H, F and S themes of romanticism, regression and rebirth, happiness, hedonism and helio-centrism, fun, fantasy and fairy tales, sun, sex and socialisation [Dann, 1996].

The allied Constructivist position whereby 'all culture is continually invented and reinvented' [Bruner, 1994, p. 397], can also contribute beneficially to the language of tourism paradigm. According to this view, 'culture is emergent, always alive and in process' [Bruner, 1994, p. 407]. Knowledge is textual and 'the meaning of the text is not inherent in the text but emerges from how people read or experience the text' [Bruner, 1994, p. 407]. Consequently, 'no longer is authenticity a property inherent in an object, forever fixed in time; it is seen as a struggle, a social process, in which competing interests argue for their own interpretation of history. Culture is seen as contested, emergent and constructed, and agency and desire become part of the discourse' [Bruner, 1994, p. 408]. This theoretical standpoint is particularly helpful where the analysis focuses on tourism heritage, as for instance in the representation of New Salem as a site associated with Abraham Lincoln – where meanings and performances are constructed for visitors, who, in turn, bring their own interpretations to the scene [Bruner, 1994]. The perspective can, however, also be extended to contemporary performances,

as Bruner and Kirshenblatt-Gimblett [1994] have shown in relation to the Maasai performing for tourists in the neo-colonial setting of Mayers Ranch just outside Nairobi. According to them, both parties may be considered as 'players in a show written by international tourist discourse. Both are positioned in that discourse and are allocated space within it' [Bruner and Kirshenblatt-Gimblett, 1994, p. 467].

The notion of performance has been further developed in Goffman's [1959] dramaturgical perspective, which, when combined with Durkheim's [1912] ideas on collective representations, has contributed to MacCannell's [1989] understanding of the process of sight sacralisation. Applied to the language of tourism at the on-trip stage it is easy to see how meanings are orally exchanged by guides and visitors as they move through "verbal door-ways" to the inner sanctum of the site [Fine and Speer, 1985]. A similar process is at work in the dramatic interpretation of heritage by guides in Israeli settlement museums [Katriel, 1994].

These three examples should be sufficient to demonstrate how differing theoretical perspectives are subsumed within a given paradigm – in this instance, a socio-linguistic paradigm. There are, of course, many other exciting possibilities.

An Illustration of a Multi-theoretical Paradigm at Work

In order to illustrate the foregoing, it is useful to turn to a series of five award winning advertisements promoting a well-known international hotel chain.[7] The publicity appeared from March to July 1995 in the pages of *Business Week*, and is clearly targeted at the businessman abroad. Here it is possible to see how the language of tourism paradigm can help people understand what is going on.

The first advertisement [Hilton, 1995a] is a double page spread. Although no clear identification is made in the accompanying text or from any explicit site markers in the photograph to distinguish it from Sri Lanka or Thailand, for example, the location is probably India. The picture shows a white male tourist leaning over and talking to the invisible driver of a three-wheel taxi by the side of a road bordered by palm trees and tropical undergrowth. Just in front of the tap-tap are four elephants in single file each with its own native mahout. Three of the riders are looking back at the

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[7] The chain in question, The Hilton, was awarded "Best Global Press Campaign" and "Best Campaign Aimed at an Upmarket/Business Audience" at the annual International Advertising Association/Media Marketing Europe meeting in London, October 1995. The strategy was developed by Zenith Media Worldwide and Saatchi & Saatchi Advertising.

tourist, seemingly intent on hearing what is being said. Directly over the head of the tourist are written the words, 'Take me to the Hilton!' At first one obtains the impression that the tourist is asking the cabby to drive him to the hotel. Yet from the following text in the right hand margin it appears more likely that he is foregoing the cab ride and instead intends arriving maharajah style:

> It was going to be a bumpy ride. But after the rough the smooth. Armed with the American Express Card, I'd already called the Hilton and booked ahead, and I was looking forward to a relaxing few days in their capable hands. American Express and Hilton had a lot in common; nothing was ever too much trouble. I vaguely wondered what the doorman's reaction would be if I arrived by elephant; but he probably wouldn't bat an eyelid. You could always be yourself at the Hilton.

This message is immediately followed by the signature – 'Hilton where you can be your Self again.'

The language of tourism paradigm offers a useful interpretive understanding of this piece of promotion, one that is enhanced by the addition of a medley of ancillary theoretical insights. Taking the picture first, one is immediately struck by the overall colour – sepia – a tone typically employed by photographers to connote nostalgia. Here something old, traditional or premodern, is being imaginatively contrasted with the modern or postmodern (a Third World image versus a First World image). However, unlike many advertisements where the object of promotional quest is highlighted, on this occasion the "before", rather than the "after", is depicted. There is no view of the "Promised Land" of Hilton and what it has to offer. Instead the traveller is seen planning his journey – deciding between two forms of transportation. Interestingly, and by way of significant omission, there are no women in the picture. Nor are there any elderly persons or Caucasians other than the tourist. The only representatives of the local population are the elephant drivers and the presumed taxi-man (i.e., those linked to the tourist by subordinate roles).[8]

The body copy continues the iconographic discourse of opposites, which Structuralists such as Lévi-Strauss [1958] and Langholz-Leymore [1975] term the language of "myth", in the sense that 'myths are messages based on a code with structures similar to those of a language' [Lévi-Strauss,

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[8] O'Barr [1994] describes the pictorial representation of coloured natives in servile roles catering to the needs of white tourists as "photographic colonialism". Interestingly, the example he provides is from Jaipur in India. Here tourists are treated like royalty aboard an elephant while the bearers are arranged below. The caption is "sitting pretty in the pink city".

1958, pp. 206-231, in Nöth, 1990, p. 375; see also Selwyn, 1996, p. 3]. The bumpy ride is contrasted with relaxing days, the rough with the smooth. At this sub-surface level, or what Denzin [1989, p. 230] calls "a subversive reading", the strangeness of the first scenario is contrasted with the familiarity of the Hilton (being in capable hands, the doorman, and discovering oneself through homecoming), insights furnished by Simmel [1950] and elaborated by Cohen [1972, 1974, 1979] in his various tourist typologies. The tense of the discourse is future perfect, and the "looking forward" as a personal *project* is couched in terms of Schutz's [1972] *projected* "because of" and "in-order-to" motivation. The reflexive quality of the text is similar to the interaction of the Self and a conversation between the "I" and the "Me", epitomised in the writings of Mead [1934] and subsequently by Symbolic Interactionists. Since the language of the first person is one of testimony, the potential tourist, at whom the message is directed, is invited to exchange places with the traveller – to identify with the "I" of the publicity [Williamson, 1983], and thereby become transformed [Bruner, 1991]. The change from the hypothetical "could" and "would" to a more realistic "can" ("Hilton where you can be your Self again") supports this interpretation.

The second advertisement [Hilton, 1995b] shows an unidentified Southern European small town reminiscent of Foix in the Pyrenees border region between France and Spain. The houses are very close together and the intervening narrow winding alleys collectively transmit the metaphor of a mediaeval labyrinth [Lash, 1991, pp. 33-35; Urry, 1990, p. 97]. In a tiny opening it is just possible to discern a white man in shorts talking to the invisible driver of a car. 'Take me to the Hilton!' he commands. Again the colour is sepia. Once more the subject is young and male and there are no local inhabitants other than the presumed car driver. The vehicle, as with the elephants in the first ad, represents a means of escape – transportation wherein the Self can be transported. The accompanying body copy reads as follows:

> I'd enjoyed being lost in this charming maze, but the phone call had been urgent. It was worth breaking into my holiday for an important client and we'd be meeting at my favourite hotel. The people at Hilton would make my stay pleasant as always. And with the American Express card I could settle the bill, pay the car rental and replenish my dwindling stocks of local currency. Business or pleasure, Hilton would keep me in the holiday mood.

And then the familiar strap-line:

"Hilton where you can be your Self again."

As before, contrasts are established – the pre-modern maze versus modern order, pleasure versus business – only on this occasion the target is more obviously the *repeat* businessman. This is the language of 'now I can do it again' – ("my *favourite* hotel", "pleasant as *always*" (emphases added)). Here, too, Hilton paradoxically attempts to become something of a place, while retaining the qualities of placelessness [Relph, 1983]. Rather than being referred to as "*the* Hilton", or as a hotel, it surrenders the definite article and is spoken of as having its own inhabitants. Yet the pejorative "these people" are alluded to asymmetrically as being in inferior positions to the businessman. They exist solely to make his stay pleasant; they are paid employees (mention of the bill). They stand in contrast to the "client" who is deemed sufficiently "important" as to cause a break in the holiday and to summon the businessman by phone. Both are subsequently referred to as "we" – consociates. The people at Hilton, on the other hand, merely constitute an "I"-"They" relationship [Schutz, 1972]. Interestingly, the spelling of "favourite" is anglicised, emphasising the international quality of Hilton rather than its former image of an American home away from home [Boorstin, 1987, pp. 97-99].

The third advertisement [Hilton, 1995c] reveals a Far Eastern scene, where a robust looking middle aged Caucasian man is shown standing arrogantly at the prow of an over-laden small ferryboat. He is dressed as an explorer in a bush jacket with his trousers tucked into his boots. His beard and long mane of silvery hair confirm the impression that he has been away from "civilisation" and the dictates of convention for a long time (cf Barthes' [1984, pp. 47-49] description of Abbé Pierre). With his hands thrust belligerently into his pockets and his eyes fixed resolutely ahead into the distance (which carries the viewer out of the picture to the hidden promises beyond), he demands in traditional "gender-speak" [Swain, 1995] from his all male, oriental [Said, 1991] entourage that he be taken to the Hilton. Judging from the type of vessel – a sampan – the shape of the surrounding mountains (typical of many paintings from this part of the world), and the physiognomy of the oarsman, tiller-man and fellow passengers, the country is probably China. The overall hue is duck egg green which, like the sepia tone of before, assumes a similar nostalgic signification, in this instance taking the viewer back to the age of discovery where travel (and gain through pain) ruled the day, as opposed to the pleasures associated with contemporary tourism [Boorstin, 1987; Cocker, 1992]. Yet here it is precisely this contrast that the advertisement wishes to reverse in its structure of opposites, as the following body copy illustrates:

> Anyone who felt that it was better to travel hopefully than to arrive, I thought, obviously stayed at the wrong hotels. 'Take me to the Hilton!' The ferryman smiled: we both knew I still had a long way to go. But they'd be holding my

room, even though I'd booked weeks before. With the help of their business centre, I'd soon have my notes sorted out. And a large measure of my favourite single malt would do the same for me. Hilton. It was great to be heading back.

Here the first person singular, along with its corresponding possessive adjective, comprises almost one tenth of the word count. This egocentric imaginary conversation, culminating in "being oneself again", in terms of transactional analysis, represents the victory of the Child over the Parent and Adult [Berne, 1986; Harris, 1967]. It is this super-ordination of the Ego which renders the discourse so asymmetrical (the ferryman carries out the orders, "they" hold the room and supply a business centre, while the "I" heads *back* to maternal comforts and whisky *ad libitum* – the drinking of which is strangely synonymous with sorting oneself out). Here the metaphor of regression to the womb is enhanced by the addition of liquid sustenance which, as Barthes [1984, pp. 58-61] points out, is totemic in connotation. That is presumably why on those occasions where hotel rooms are shown in brochures they tend to resemble the cocoon-like structure [Dann, 1989] of the tourists' environmental bubble [Cohen, 1972]. Cazes [1976, pp. 21, 41-42] calls this *narcissisme hôtelier*, an interior world protecting the Ego from external danger. In the advertisement the above situation obtains through a combination of picture and text. In the ad there is no hotel room. Instead, it emerges projectively [Schutz, 1972] through internal dialogue as an alternative for the explorer returning from the outside world of raw nature. The commentary reveals that his final destination is the familiar home-from-home refuge of controlled nature – Hilton as *protectrix*.

The fourth advertisement [Hilton, 1995e] shows a desert (possibly Egyptian) with a moonscape-like foreground and a few date palms in the distance. About two thirds of the way up the picture, and slightly off-centre, there is a four- wheel drive vehicle. In front of this latest symbol of yuppie affluence, two men, their heads lowered from the heat, are seemingly engaged in conversation. Whatever the topic, its conclusion is the familiar command 'Take me to the Hilton!'

Urbain [1993] describes such a wilderness as *le confin des confins*, a *lieu limite* at the *bout du monde*. This catastrophic site, which begins where the countryside ends, is said to hold a particular fascination for the more adventurous tourist since it represents the very threshold of life and death. In this sense, the desert responds to a deep need. In Urbain's terminology, it is *un voyage dans l'au-delà*, the ultimate satisfaction of the *mystique vacancière*. It is a natural void, a primitive chaos, a pre-human space of solitude and contemplation, a radical *terra incognita* of pure nature. The desert also represents the location of the divine where many aesthetes of yore used to seek

fulfilment and self-discovery of the *soul* through a process that led from initiation to ecstasy [Adler, 1994, pp. 409-410]. At the same time, it is a place of terrible endurance where nature is conquered through sheer physical exertion, an environment exposing the Self to risk and danger, where the *body* is pushed to its limits.

The Hilton ad rejects the discourse of adventure travel (of treks across the Sahara and of egalitarian trucking tours), and in its place substitutes a language of status-driven reward – a rhetoric of the oasis:

> I'd had enough of sand. Now I needed civilisation. After a fascinating week in the wilderness, it was time for some creature comforts. Time to make tracks for the Hilton. "Very good hotel", my driver said. He was right. How I looked forward to a cool leisurely swim, a clean airy room. And to that special attention that was somehow uniquely Hilton: efficient, yet friendly, polite yet pleasantly personal. In a few hours' time, I'd be refreshed, revived, restored: back to my old self. Thank goodness for Hilton, I thought. An oasis if ever there was one.

Here the wilderness experience, whatever its deep symbolic meaning for the ultimate traveller, is trivialised by the cliché "fascinating." Moreover, as the text continues and the explicit contrasts are respectively drawn between the desert and the Hilton (heat versus cool, wilderness versus civilisation, sand versus comfort, dirt versus cleanliness, solitude versus special attention), it is clear that the tourist has had enough of toiling in the wilderness and instead wants his land of milk and honey. The Self exposed to the pain of "travail" is simply too much to bear. There is a need to return to one's former Self (the Self of childhood), reinforced by the regressive alliteration of "refreshed, revived, restored."

Williamson [1983, p. 66] has noted a similar Lacanian tendency in package tour publicity. In an advertisement put out by the UK operator, Thomson, in one of its Winter-Sun brochures, the headline asks, 'When were you last yourself?' The body copy continues:

> When did you last wake up and actually feel great to be alive? Or even generally quite chuffed? One of the dangers of our times is the temptation to over-reach, to tighten our belts till it's difficult to breathe and sit waiting numbly for something nasty but not quite identifiable to happen. Break out with a Thomson holiday this coming winter and you'll hardly recognise yourself…Call your travel agent and tell him there's someone inside you screaming to get out. Your good old chirpy, life-is-for-living self. We take care. You're free to enjoy yourself.

Here, she says, the suffocated and frightened Ego is contrasted with the Ego ideal of freedom and happiness through a life-is-for-living tautology.

The final advertisement in the series [Hilton, 1995d] shows another rocky wasteland. Unlike the previous desert scene, however, there is a good quality road running across the foreground of the sepia-toned double-page spread. By the side of the highway, the tourist's car has been temporarily abandoned. The bonnet is up and the exposed engine suggests some undisclosed mechanical problem. The tourist himself is a few metres away talking to the driver of a huge container lorry, the latter having presumably stopped in response to the former's helpless situation. Here the trucker, instead of being invisible, is revealed in more egalitarian terms of standing beside the tourist on the open road. Yet the solution, as always, is 'Take me to the Hilton', and the highway, it would seem, does precisely that as it leads promisingly out of the picture. The supporting text reads as follows:

> The truck driver laughed. His first words had been, 'G'day mate – anything I can do?' But hitching a lift was a bit impractical. Within minutes, we'd called for help on the truck's impressive radio, and let the Hilton know I'd be late. Seeing his friendly face reminded me how much I was looking forward to meeting the Hilton people again; they always made me feel particularly welcome. He climbed into his cab. 'Hilton, eh? Wanna change places?' I thought about the cold beers and cool sheets waiting for me. 'No chance,' I said, waving him on his way. 'But thanks.'

This last piece of publicity differs from the other four ads in several respects. First, the *terminus a quo* is identified via the stereotypical "G'day mate" as Australia. The right-hand drive of the vehicles and the fact that they are on the left- hand side of the road confirms this interpretation. The other advertisements, by contrast, leave the onlooker guessing as to their exact whereabouts. Second, Australia, unlike India, Egypt and China of the periphery, belongs to the centre. However, it shares with the Southern European picture a *remote* First World location. There it was the labyrinth; here it is the outback of down-under, thereby setting up the subsequent series of contrasts between a far-flung outpost and the hub of activity constituted by the Hilton. Third, the other character in the picture, while admittedly of lower status than the tourist, is nevertheless on racially equal terms. It is therefore possible to transfer the cultural Aussie practice of beer drinking – reportedly some 30 gallons per capita annually – to the "cold beers" of Hilton. Fourth, the more symmetrical relationship results in the initiation of the conversation by the truck driver, greater dialogue and turn taking, the use of "we", and even the suggestion of changing places. Yet, because of the remaining class distinctions, this last proposal is dismissed by the super-

ordinate. The idea of riding in the cab is considered "a bit impractical", and the driver is waved away with a "thanks, but no thanks." The driver, however friendly his demeanour, is placed on par with the Hilton employees.

Nevertheless, and in spite of the foregoing differences, the basic structure of the Australian ad is the same as the others. There is the notion of looking forward to something already experienced ("meeting…again", "always made me feel"), the idea of welcome, the contrasts between the heat and both the cold beer and cool sheets, and the reference to the Hilton and its people as a safe haven. The childlike dependency in this instance is evident in the perceived need to let Hilton know about being late. There are also the usual allusions to creature comforts and a heavy dose of the first person singular.

Conclusion

The foregoing examples should illustrate the extent to which "the language of tourism" paradigm draws on several theoretical insights, from perspectives as diverse as Conflict Theory, Structuralism, Symbolic Interactionism, Feminism and Phenomenology, in order to interpret the jigsaw of meaning that has been so cleverly assembled. Yet, in spite of the attempt to grapple emically with the mental processes of promoter and client, and perhaps even those of the visited "native", the understanding is only partial. Some unanswered questions still remain. Why, for instance, does the Chinese ferryman smile so inscrutably and the Australian truck driver laugh at the tourist's command, 'Take me to the Hilton'? Is it nervousness, insubordination, lack of understanding, the ludicrousness of the situation, a combination of the above, or simply that their respective tourism authorities have asked them to greet visitors in this fashion as part of their local involvement campaign?

A socio-linguistic paradigm, while not discounting idiosyncratic motives, prefers to deal with them in their typicality by sensitising the interpreter to the all-pervading presence of symbols. The smiling oriental stands for happiness [Said, 1991]. Laughter points to friendliness of disposition in dealing with total strangers. At the same time, one becomes aware that the use of such symbols problematises the encounter between host and guest where clearly there is room for mutual distrust and exploitation [van den Berghe, 1980]. In other words, symbols do not simply signify; they ask questions and demand explanations. The "language of tourism" paradigm, particularly when seen to include a number of compatible theoretical perspectives, can help supply some of the missing answers.

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FOLIA TURISTICA

A Brief Outline of the Academic Achievements of Graham M.S. Dann and His Contribution to the Development of Tourism Research

Graham Dann received his PhD in sociology in 1975 and was awarded a higher doctorate of DLitt in tourism in 2003. His major tourism research interests comprise: tourist motivation, the semiotics and socio-linguistics of tourism promotion, tourism imagery, the sociology of tourism and travel writing. He has participated and co-operated in a number of funded and non-funded research projects. Among instances of the former are *The Socio-cultural Impacts of Tourism in Barbados, Curaçao, St Lucia and Tobago* – United Nations Economic Commission for Latin America and the Caribbean and *Images of the Lofoten Islands* (with Jens Jacobsen) – Research Council of Norway. Although at the beginning of his academic career Professor Dann took on a variety of projects that belonged more to mainstream sociology (e.g., everyday life, alcoholism, quality of life, race and class in Barbados, and religious graffiti in North-east Brazil), once he had gained promotion and tenure, he was almost exclusively tourism oriented in his research.[9]

There were two initial stages in his personal career trajectory – those of doctoral and postdoctoral study and of lecturing and researching in the Caribbean (1975-1996). The first included a brief stint at the Social Science Research Council in London, where he collaborated on early quality of life investigations in the UK and USA. The second saw him taking up a lectureship in sociology at the University of the West Indies in Barbados from which he was successively promoted to senior lecturer and reader. In 1996 he was appointed the first Professor of Tourism at the University of Luton, UK, later to become the University of Bedfordshire. Since 1999 he has also participated in the development of a Masters programme at Finnmark University College in Alta in Norway. He has additionally co-supervised and examined several PhD theses on tourism, i.e., at the universities of the West Indies, Luton, Birmingham, Strathclyde, Derby, Manchester Metropolitan, London Metropolitan, Royal Holloway (University of London), Calgary and Tromsø (Norway). Although he retired in 2007 after a distinguished career spanning some 40 years, he is still immersed in academic activities.

In Dann's studies on tourism three main areas of research may be identified: an emphasis on tourist motivation, the development of an eclectic approach to theory

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[9] I am grateful to Professor Graham Dann for his assistance in preparing the dossier. See also Dann, G. (2007), *The Life and Times of a Wandering Tourism Researcher,* [in:] D. Nash (ed.), *The Study of Tourism. Anthropological and Sociological Beginnings*, Elsevier, Oxford, pp. 76–92.

and the shift from quantitative to qualitative methodology. He started to examine tourism during his professional sojourn in Barbados. Given that this Caribbean island was very much reliant on revenues from tourism, he decided that a useful project would be one that focused on that applied field. He chose to concentrate on the then fledgling concept of motivation, since this was largely unchartered territory in a domain thus far dominated by the discipline of economics. Here an important distinction was elaborated in terms of push and pull factors, the former being logically and temporally prior to the latter. Theoretical attention was further based on the work of Durkheim and Veblen and their respective contributions to the spheres of anomie and ego-enhancement. The results of the research were duly written up and submitted to a then relatively new journal known as *Annals of Tourism Research* (1977). The article appeared under the title *Anomie, Ego-enhancement and Tourism*. It is the second most widely quoted of all his publications, and the subsequent empirical testing of the push-pull paradigm by others has only served to re-confirm its status. In 1981, and in the same journal, he had another article published that was entitled *Tourism Motivation: An Appraisal*, which received an even greater citation count. With these two papers setting the scene, he was invited in between their publications in 1978 by the editor-in-chief of *Annals*, Jafar Jafari, to become a member of the editorial board. He played an important role in shaping editorial policy and contributed towards making *Annals* the leading tourism academic journal that it is today. (Having been for a while on the editorial board of *Tourism Management* he also continues to serve in a similar capacity on two other leading tourism journals: *Tourism Analysis*; *Tourism, Culture and Communication*).

In searching for the supply counterpart to tourist motivation demand, he underlined the role of push factors in tourist motivation. In this view, destination authorities tried to match their offerings with the needs of potential tourists. The crucial element here was not the attributes of a place but its imagery, and the way that it was transmitted via verbal and pictorial representation. In the late 80s, Dann undertook studies of tourist brochures and analyzed *inter alia* how indigenous people were featured or how a country was thematized for international mass markets. In the case of Cyprus tourism (1988), the issue of determining self-imagery had surfaced, a point that he continued to emphasize in subsequent publications. He also examined travelogues and advertising, and conducted a large in-depth investigation of tourists in Barbados, that led to the comparison of tourists' stories with the official language of promotion. Dann analyzed the verbal framing of tourists' experiences and was able to unearth latent motivation expressed *a posteriori* in the respondents' own words, rather than in *a priori* constructed researcher's checklist. Moreover two motivational features – nostalgia and the tourist as child – were explored on the basis of this socio-linguistic investigation.

Graham Dann began to expand his theoretical position by linking the two basic domains of motivation and promotion since one was the analogue of the other. Thus his attention started to centre on such areas as imagery and how it was transmitted to potential tourists. From here it was but one step to a concentration on how promotional messages were transmitted to their addressees and the extent to which they were credible. In 1996 his *magnum opus* appeared. Entitled *The Language of Tour-*

ism, it attempted for the first time to bring together various themes that he had been working on in the preceding interval.[10] One was the notion of social control; another was the idea of the tourist as child (above); yet another examined the numerous media of the language of tourism from the printed word to televised imagery with all stages in between. Only later with the coming of the digital age did it become necessary to modify his position on the monological quality of the language of tourism and to entertain the alternative possibility of trialogue among the three principal parties (tourist industry, tourists and tourees) via such outlets as blogs, electronic guidebook forums, and other forms of online communication. Many of these new media became the subject of separate investigation and publication. He also began to explore a number of underpinning ideologies contained therein, such as gendering and othering and the various sociolinguistic devices they employed, like cliché and hyperbole, for example.

In the development of an eclectic approach to theory, he was inspired by Alvin Gouldner and Erving Goffman, *enfants terribles* of sociology, refusing to accept the functionalist paradigm. Another significant influence on Dann's work was Norman Denzin, with his groundbreaking publications on qualitative research in general sociology, and also Ed Bruner in relation to tourism. As regards the latter, he also had the occasion to collaborate with Erik Cohen who had been expounding similar, eclectic approach since the 70s. They wrote a paper *Sociology and Tourism* for a special issue of *Annals* dedicated to tourism and the social sciences (1991). His first study of tourist motivation (1977), (as well as his other early projects), were largely – but not exclusively – quantitative. Subsequent research, mainly qualitative and based on content/semiotic analysis, was almost exclusively tourism oriented. Typical topics comprised: images of Cyprus, travelogues and the management of unfamiliarity, hyping the destination through the rich and (in) famous, tourists' knowledge of destination culture and the people of tourist brochures. One of the effects of this quantitative to qualitative transition was the special issue of *Annals* on methodology, prepared in collaboration with Dennison Nash and Philip Pearce. The resulting lead article was entitled *Methodology in Tourism Research* (1988) which presented the criteria of theoretical awareness and methodological sophistication that, in the opinion of many commentators, most tourism research to date still does not fulfil.

In those early days Dann's works constituted something of a pioneering status. However, because they also attracted debate and a certain amount of controversy, the field was able to progress in a dialectical fashion via thesis, antithesis and synthesis. The way ahead thus looks promising, but only up to a point. The major obstacle to this development is that for progress to be assured new theories have to be discovered and they must be grounded in social science disciplines if they are to gain any academic acceptance. Unfortunately the theoretical state-of-the-art seems to be currently limited mainly to paradigms originating in the 1970s in the Anglophone world and even earlier in the 1920s and 1930s of continental Europe. These arguments are dealt with his latest co-authored book, entitled *The Sociology of Tourism*: *European Origins and Developments* (with Giuli Liebman Parrinello, 2009).

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[10] Dann G. (1996), *The Language of Tourism. A Sociolinguistic Perspective*, CABI, Wallingford.

Graham Dann is also a founder member of the International Academy for the Study of Tourism (1988). This influential group comprises a number of leading researchers in the interdisciplinary study of tourism. Membership of IAST enables researchers to share knowledge and test theoretical ideas that are so essential for the scholarly treatment of tourism. Moreover, he belongs to the International Sociological Association (ISA). The latter had a group dedicated to the sociology of leisure, with such recognised researchers as Joffré Dumazedier. In 1982 Dann joined and attended its sessions in Mexico City and – in collaboration with Marie-Françoise Lanfant and Krzysztof Przecławski – started to create a separate tourism unit within the ISA. In 1994, in Bielefeld, the autonomous research committee on tourism, originally derived from the research committee on leisure, was established.

Professor Dann's contribution to the global tourism research has been immense and highly regarded. He has written 10 books, 2 monographs, about 140 articles, chapters in books, reviews and commentaries (plus 4 forthcoming and 3 works in progress). Some of his papers have even been translated into Croatian, Hungarian, Italian, Japanese, Norwegian, Polish and Spanish. His biography and works are closely related to the development of tourism studies from the very beginning, and embrace a spectrum of controversies and hopes which are still present within the field today and also possibly tomorrow.

(profile prepared by Sabina Owsianowska)

THE ORIGINS OF THE TOURISM AREA LIFE CYCLE

*Richard W. Butler**

Abstract[1]**:** In 1980 R.W. Butler published a theoretical model of the evolution of a tourist area (*The Concept of a Tourist Area and Cycle of Evolution: Implications for Management of Resources)*, better known by the acronym TALC. Butler's concept became a classic model, which continues to be developed to this day. In recent years it has been modified multiple times, but also confirmed by authors around the world. A quarter of a century after its debut in the pages of *Canadian Geographer* magazine, Butler oversaw the publication of a comprehensive, two-volume monograph entitled *The Tourism Area Life Cycle* (Vol. 1: *Applications and Modifications,* Vol. 2: *Conceptual and Theoretical Issues*).[2] Volume One includes over a dozen articles presenting the premises of Butler's model, its implementation, and its use in interpreting the development of cultural heritage sites or tourist regions. The second volume include works that describe the theoretical bases of the TALC model, alternative conceptions, and numerous modification and applications. The following text, the first chapter of Volume One, takes us to the source of the theory of the evolution of the tourist area. It culls from the author's experiences in the 1950s, from observing British recreation sites like the Isle of Arran in Scotland, Rhyl in Wales, summer vacation sites on Clyde River and research (from his PhD thesis) conducted in the highlands and mountains of Scotland. His observations of changes occurring in the development of tourist regions in the British Isles and Continental Europe (such as Opatija, presently in Croatia) formed the basis for his theory of tourist site evolution. Butler published his first work on forecasting the development of tourism in 1972 (co-written by Brougham) at a sitting of the Travel Research Association in Quebec; it sought to form a hypothetical model for tourist destination development. R.W. Butler's work draws upon Christaller's earlier theories of peripheral centres, and Plog's psychogram of tourists, which had a considerable influence on the final shape of his theory. He also mentions Stansfield's work on the development of Atlantic City, Doxey's articles on changes in the relationships between residents of tourist centres and the tourists themselves, and the works of Roy Wolfe on the summer homes and beaches of Wasaga in the province of Ontario. In constructing his asymptotic curve, Butler was helped by Darling's study on changes in deer herd populations. In conclusion, the author states that the idea of the model of tourist site development appeared

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a century before his now-classic work of 1980, as proven by Godkin's 1883 article in *The Nation* on the development of American resort towns, Hobbs's piece for *Worcester Magazine* in 1915 and Gilbert's article for *The Times* in 1939. It was only with Butler's work, however, that an academic framework was given to the concept of the cyclical development of the tourist area.

Key words: TALC – Tourism Area Life Cycle, the origins, concepts, antecedent and contemporary

Introduction

The origins of the Tourism Area Life Cycle model have been discussed before in a number of academic papers, both by this author [Butler, 1990, 1998a, 2000] and others (see contributors to this and the accompanying volume). It is felt appropriate at this point to expand further upon those origins in order to place the model and its development in a clearer context. This is done partly to correct what may have been misperceptions of the real origins of the initial (1980) article [Hall, personal communication, 1996], and to elaborate upon comments made by this author in the earlier papers referred to above. As well, it is felt necessary to re-emphasize the importance of understanding from whence the academic literature on tourism, of which the TALC paper is a part, has evolved. All too often, in this writer's opinion, current students of tourism are led to believe, or come to the conclusion themselves, that tourism is a recent phenomenon, and that relatively little had been written on it before the 1990s. Such misperceptions have partly contributed to the still relatively low academic reputation which tourism has as an academic subject, and the all too familiar occurrence of scholars in more established subjects venturing into publication in tourism on the faulty assumption that it is a 'new' area waiting to be discovered and 'enriched' by their often somewhat limited contributions.

The TALC model as it initially appeared in its 1980 form had a distinct gestation period and was based on, and integrated within it, several strands of research and conceptual development. Although it may not appear overly so in its published form, it was inherently based in the geographic literature, reflecting the author's training and interests in geography. It is not by accident that several of the contributors in these two volumes (in particular Coles, Hall and Papatheodorou, all geographers themselves) draw attention to this linkage in their own chapters.[3] The 'facts' on which the

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[3] *The Tourism Area Life Cycle*, Vol. 2. *Conceptual and Theoretical Issues,* ed. R.W. Butler. Channel View Publications, 2006 contain article: T. Coles, *Enigma Variations? The TALC, Marketing Models and the Descendentes of the Product Life Cycle*, pp. 49-66; A. Papatheodorau, *TALC and the Spatial Implications of Competition*, pp. 67-82; C.M. Hall, *Space-Time Accessibility and the TALC: The Role of Geographies of Spatial Interaction and Mobility in Contributing to an Improved Understanding of Tourism*, pp. 83-100.

model is based are fairly obvious to any would-be observer of tourist resorts (as shown in the Postscript to this chapter), just as people were generally aware that apples appeared to always fall to the ground before one hit Newton on the head, resulting in the explanation of gravity Before any reviewer draws the erroneous conclusion that the TALC is being compared to, or thought equal in significance to the theory of gravity, let me dispel any such arrogance of thought. The point that is being made is that there was nothing devastatingly complicated or original in the data or facts on which the model is based. Lundgren [1984; 22] summed up the situation very aptly when he commented "Butler put into the realistic cyclical context a reality that everyone knew about, and clearly recognised, but had never formulated into an overall theory". As noted below, at the time of its development, while it seemed to make good sense, the future wide application of the model was not anticipated. The chapter proceeds first by emphasising the reflexivity inevitably involved in the formulation of any model or concept.

Reflexivity and the TALC

Just as 'we are what we eat', our knowledge and understanding of the world around us is, to a large degree, based on what we observe first hand. My initial interest in tourist destination development came from personal experience with a number of British holiday resorts and destination areas from the 1950s onwards. Living in Birmingham, the major town in England that is furthest from the sea, meant that family holidays were not confined to the nearest resort linked to the home town by the railway, as was the normal pattern in that time period, because many resorts were equally distant and thus equally inaccessible. During my formative years holidays were spent in locations as varied as Rhyl (North Wales), Weston-Super-Mare and Skegness on the west and east coasts of England respectively, and Stonehaven, St Monans and the Isle of Arran in Scotland. A good sampling of classic railway-dominated resorts, mass tourist destinations and small fishing communities using tourism to support their traditional economic activity. Arran was an interesting and somewhat different example, because it could only be reached by boat, at that time by several of the fleet of steamers (some still paddle-wheelers then) that serviced the resorts of the Firth of Clyde. Some of my abiding favourite memories are of spending 10 days of a summer holiday on the Clyde steamers, setting out from Glasgow on the train to railheads such as Gourock and Wemyss Bay, to catch the steamers and visiting different resorts each day. By the time 1 began doctoral studies at Glasgow University in the mid 1960s, the

fleet of steamers was rapidly diminishing and being replaced by roll-on roll-off car ferries, catering efficiently to a new breed of tourists but about as interesting to sail on as a modem day Ford car is to drive compared to a pre-war convertible Jaguar.

It became apparent that the resorts of the Clyde, as well as those elsewhere, were beginning to change significantly, in appearance, in accessibility, in tourists, in economic health and in attractivity. Like most Northern European resorts they were, for the first time, facing competition from Mediterranean resorts for the mass tourist market. Whereas in earlier years they had been shielded from such competition by continental conflict, relative inaccessibility, cost and what Plog [1973] might call 'pyschocentricity', from the 1960s onwards attitudes, accessibility and affluence had all changed dramatically. The old resorts were no longer as attractive to potential tourists, nor catering to the same market as effectively as in the past. Working alongside a colleague who was undertaking his own doctoral research on the Clyde resorts [see Pattison, 1968], these changes were frequently discussed. During the course of my doctoral research the same patterns became evident in other smaller resorts in the Scottish highlands and islands [Butler, 1973]. In particular, the changes taking place in the Spey Valley, with the development of winter sports, meant that villages such as Aviemore and Grantown on Spey, previously quiet Victorian summer destinations, were now being developed or redeveloped to cater to a very different winter market. The physical, as well as social and economic changes were very obvious.

My first experience of continental Europe in 1966 included a visit to Opatija [Corak, 2006], providing further visual evidence of changes taking place in well established resorts. A subsequent visit to Mallorca provided first-hand experience of why Mediterranean resorts were attracting a sizeable segment of the traditional British holiday market from British holiday resorts, Thus by the end of the 1960s I had witnessed very clearly the dramatic changes that were taking place in tourism in Britain and parts of continental Europe. At that time few people realised what might be the full extent of these changes and their implications, and extremely little had been written on the subject. In the 1960s and earlier the tourism literature was very limited, although publications such as those by Gilbert [1939, 1954], Ogilvie [1933], Pimlott [1947], House [1954] and Barratt [1958] had all discussed and analysed aspects of resort development, markets, morphology and dynamics, Their contributions today go almost unnoticed and uncredited, although they laid the foundations for much of the later work on resorts and tourist destinations. Barrett's model of resort morphology predates the work of Stansfield and Rickert [1978]

on Recreational Business Districts, for example, but is rarely mentioned unless in the context of the citation in Mathieson and Wall [1982]. The model Barratt produced is as valid in the 21st century as it was some five decades earlier when he first produced it. It is against this backdrop of personal experience and limited references that the resort cycle began to take shape.

Antecedent Literature and Concepts

In an earlier review of the TALC [Butler, 2000] two major bases for the model were identified, the Product Life Cycle and models of wildlife populations. While these were major influences, other specific writings predate these concepts in terms of influence on TALC establishment, in addition to those noted above. The first of these were articles relating to the flows of tourists and their patterns of movement, both at the micro (destination) and the macro (global) scales. This author's interest in modelling these flows and accounting for their patterns owes a very great deal to discussions with and contributions from Jim Brougham, then a research student at the University of Western Ontario. A paper produced jointly [Brougham & Butler, 1972] is, in reality, the first version of the TALC. Entitled 'The Applicability of the Asymptotic Curve to the Forecasting of Tourism Development', it was presented at the annual meeting of the Travel Research Association, held in Quebec City in 1972, To say that it did not set the audience on fire would be somewhat of an understatement, and despite a continuing interest in the ideas contained in the paper, neither author felt the topic practical to pursue much further at that time, mainly because of the perceived nonavailability of the data that would have been required.

That paper does deserve some attention, however, in the context of the origins of the TALC, as it introduced many of the key points of the 1980 model and appears to have been the first time 'the resort cycle' appears in print. (This is contrary to what I had stated in a paper Butler [1998a, 2000], where I mistakenly credited the origin of the phrase to Charles Stansfield in his 1978 article on Atlantic City.) The 1972 paper argued that much more attention should be paid to flows of tourists, building on the work of Williams and Zelinsky [1970] and Yokeno [1968]. We stated that 'from the point of view of prediction of flows of tourists, and consequent growth of tourist destination areas, the need is greatest to explain the choice of specific locations and the process of movement from one location to another over time' [Brougham and Butler, 1972, p. 1]. The second section of the paper was headed 'The Resort Cycle', and it utilised data from the resorts in the Firth

of Clyde from 1949 to 1966 to illustrate (not tremendously convincingly it must be admitted) an asymptotic curve, It also made reference to the fact that an article in the Nice Matin [1971] suggested other areas were at 'this stale in their cycle' and made reference to Christaller's [1963] article and the pattern of resort development described therein. We concluded that section by suggesting 'that a point will be reached, however, at which the rate of increase of visitors begins to decline, and may even, as in the case above, become a decline in numbers. Such a trend may be due to a number of factors, such as increasing pollution, increasing land values limiting expansion of facilities, congestion of facilities, and the availability of alternative areas' [Brougham and Butler, 1972, p. 6]. Most of the rest of that paper was taken up by attempting to model a hypothetical pattern of development of a tourist destination. It was suggested that the process 'may be satisfactorily approximated by the solution of the logistic equation:

$$\frac{Dv}{Dt} = kV(M{-}V)$$

where V is the number of visitors, T is time, M is the maximum number of visitors and K is an empirically derived parameter representative of the telling rate, or the spread of knowledge of the resort from tourists to potential tourists' [Brougham & Butler, 1972, p. 6]. The solution was proposed as:

$$V{=}MV$$
$$\frac{O}{V + (M{-}V){-}Mkt}$$

where V is the number of tourists at time t. The resulting curve is shown in Figure 1.

It should be emphasized that the main focus in the 1972 paper was the prediction of where tourist development and flows would be in the future, not the resort cycle per se. Undoubtedly reflecting the authors' geographical roots, we referred to the 'shifting rule' of Garrison, as cited in Bunge [1966, p. 27]:

> Where capacity increases require physical expansion, where the expansion cannot be in the vertical dimension and where the new space is made more 'expensive' by the presence of the phenomena itself, a shift is likely during times of capacity strain and the shift will probably occur to a new location as near to the old location as the area of induced expense will allow.

It was argued in our paper that when relocation to a new development took place in the same general location or region as the original tourist development, the pattern of development would be as illustrated in Figure 2.
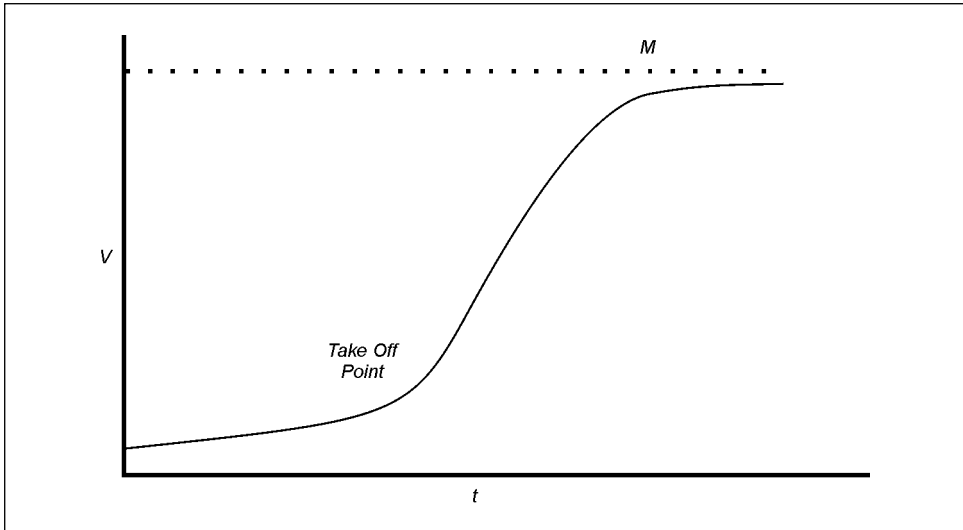
Figure 1. A theoretical asymptotic curve

The paper concluded with a brief discussion on the way that such a curve might be used for predicting the future patterns of tourism development [Marente, 2006], for examples of how the TALC can be used in a predictive manner). It suggested sufficient empirical regularities might illustrate patterns, assuming tourists would opt for nearby alternative developments although this was recognised as being a dubious assumption. An alternative approach suggested involved manipulating potential surface maps of migrant populations of specific legions, an idea not pursued in the context of tourism flows, A tentative pattern of tourist development matching the 'shifting rule' was suggested in the Mediterranean, beginning on the French Riviera, spreading to the Italian Riviera, then to Spain, the Adriatic coast and to North Africa. At this point, perhaps puzzlingly with the advantage of hindsight, Malta and Cyprus were overlooked, and Turkey not anticipated.

Contemporary Literature

(In this section contemporary is used in the context of the development of the TALC, not the present day.) Reference has already been made to Christaller [1963] and his seminal work, although it is interesting to note that the key comments in that article on the development process of tourists resorts are not the main focus of the article, but like that by Brougham and Butler [1972] were on explaining the flows and patterns of tourists.
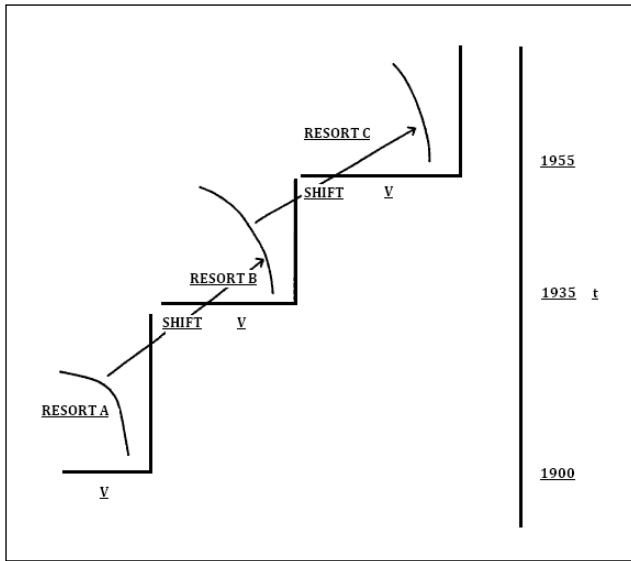
Figure 2. Modelling resort development in space and time

Christaller's contribution was significant, not least because, coming as it did from someone who was generally regarded as one the greatest contributors to theory in geography, it gave added gravitas to a tentative paper in a fledgling subject by young researchers.

Of equal importance in the development of the 1980 article was the frequently cited paper by Plog [1973] on the psychographics of tourists. It was titled 'Why destination areas rise and fall in popularity', and again, the title of this article does not really reflect the empirical work on which the article was based. This was a survey of American travellers to determine why some people were prepared to fly and others not. Perhaps ironically, it had been presented first at a meeting of the Los Angeles chapter of the Travel Research Association the preceding year, the same time and to the same association as the Brougham and Butler article had been presented. What made Plog's article of particular relevance and importance to the TALC model was that it put forward a suggested model describing how changes in the tourist market were related to subsequent changes in the destinations visited. It also included Plog's oft-quoted statement about destination areas carrying with them the seeds of their own destruction, making it one of the few articles at that time to even raise the topic of the decline of destinations. The points made in Plog's article fitted in extremely well with the ideas germinating from the 1972 paper and with Christaller's description of changes in visitors to destinations over time.

Three other papers were of particular relevance also. The first (although last in chronological order of publication) was Stansfield's [1978] article in the then recently established *Annals of Tourism Research,* titled 'Atlantic City and the Resort Cycle'. In this paper Stansfield discussed and analysed the rise and decline, and then rebirth of Atlantic City through the legalisation of gambling there. In doing this he supplied support in the academic literature for the concept of a cycle and a convincing example of the process of rejuvenation of a tourist destination. Stansfield has been one of the major contributors to the literature on resorts, and his earlier articles (1972) on the Recreational Business District (1970) were both highly insightful and innovative.

A second paper of considerable importance was that by Doxey [1975], yet another paper that was first presented at a meeting of the Travel Research Association. His well quoted "Irridex" proposed a process of change in resident attitudes towards tourists in destinations. It suggested, in line with the adage 'familiarity breeds contempt', that over time residents of tourist destinations would move from a positive to a negative attitude towards tourism. While it has been argued [Butler, 1975] that such a view is probably too simplistic, the overall proposition of the article, that destinations and the attitudes of their residents change as tourism development takes place, clearly complemented well the other literature on resorts available at the time. Subsequent research on resident impacts (see, for example, Johnson and Snepenger, 2006) has shown how much more complicated this subject is, but such research was not available in the 1970s.

Finally, the third paper, which helped throw additional light on the process of change in tourist destinations, was one of several invaluable publications by Roy Wolfe [1954]. Acknowledged as the 'Dean' of Canadian, and perhaps North American researchers in the 1950s and 1960s in outdoor recreation and tourism, Wolfe and his contributions are far less cited and well known in the tourism literature than they deserve to be. His epic study on second homes in Ontario (1948) provided a key link between 'old' and 'new' studies of tourism, and his works with the Ontario government on highway travel models are far in advance of most academic work in this area being published at that time. Wolfe's article on Wasaga Beach [1952], the classic Canadian 'honky tonk' resort, discussed its "Divorce from the Geographic Environment" and traced its development from a quiet second home location to the major tourist and recreation destination in Ontario. In this he confirmed the importance of location, the way that development changes the role and importance of natural features in a destination's attractivity, and the influence of exogenous factors on tourism patterns. It was published in *The Canadian Geographer* almost three decades before the original TALC article.

To this rather limited number of references on resort development processes and related research should be added an even shorter list of writings that pertain to the other "leg" or foundation of the TALC, that dealing with wildlife ecology and populations. This literature and its influence were not, in fact, cited in the 1980 article, although they have been referred to in subsequent discussions of the TALC [Butler, 1990, 2000], and Haywood [1986] also drew attention to such an analogy with wildlife population cycles. The comparison with wildlife populations was key to the development of the asymptotic curve in the 1972 article discussed earlier but the links were somewhat more tenuous and less profoundly academic than might be imagined. Again, my personal background intervenes. I had for a long time been a keen bird-watcher, and thanks to an excellent school library, had become familiar with the writings of the late Frank Fraser Darling, a naturalist and scholar. His books Island *Farm* [1943] and *Island Years* [1941], read in lieu of assigned school material, encouraged me to read more of his work, including *A Herd of Red Deer* [1936] based on his PhD research. Some of my apparently misspent afternoons in the school library proved useful eventually, and Darling's comments on the population fluctuations of 'his' herd of deer obviously remained in my memory. When writing the 1972 paper and looking for support and assistance in drawing the development curve, his comments proved invaluable:

> Mathematicians have helped ecology enormously by their analysis of data of experimental animal populations... We know now the nature of the asymptotic or S curve applied to animal populations, that after a slow start of increase in a population in an ample habitat there is a sharp rise in increase or productivity until near saturation of the habitat, whereafter the curve flattens out, making the numbers of the population more or less static. The animal manager gets ready for a catastrophic fait if he has read the signs [Darting, cited in Thompson & Grimble, 1968, p. 47].

The analogy to a tourist destination, growing rapidly, without apparent regard for the future or the preservation of its resources, of a wildlife population increasing with a natural lack of regard for the future and the ability of the environment to sustain the increased population was a strong one to us, even if a little peculiar to others at the time. It has been interesting to read of support from others for an analogy between TALC and wildlife ecology and natural systems [Haywood, 1986, Ravenscroft, other volume], especially as this was not discussed in the 1980 model.

Final Comments

This chapter has been intended to provide more detailed background to the development of the TALC model than had hitherto been available in order to provide a context for the chapters in this and the other volume. It may be pretentious to argue that the old generation have an obligation to interpret the past for future generations, but it is surely better for those who were working in the past (even if we occasionally appear to still live there) to take on that task rather than to leave it to those who were not. Admittedly we may at times be guilty of putting a more favourable gloss on developments and processes to hide our ignorance and embarrassment, but we are the only ones in a position to know how and why particular ideas emerged at specific times and others did not. What we cannot do is explain *why* particular ideas take hold and remain popular when others disappear.

There remain a few items to address. One is why a tourism article should appear in a journal such as *The Canadian Geographer,* which did not have a strong record of publishing articles on tourism. Excellent journal though it is, its relative obscurity outside the field of geography and thus absence from libraries in institutions that do not offer geography (the author's current university is a case in point!), mean that increasing numbers of students and others working in tourism do not have easy access to the original article. It is clear from citations appearing in the literature that some writers citing the TALC are doing so 'second hand', and its all-too familiar curve is taking on more variations than Paul McCartney's 'Yesterday.' This inaccessibility of the original publication was one of the reasons for reproducing it in this volume, and I am most grateful to the Canadian Association of Geographers for giving permission for this. *The Canadian Geographer* was the vehicle of publication because the original paper was presented at the annual meeting of the Canadian Association of Geographers in Vancouver, 1980. At the urging of Peter Murphy, for the first time in its history, the journal produced a special issue, one devoted to tourism and recreation, containing some of the papers presented at the annual meeting, reviewed and edited by Murphy.

A second point that needs addressing and is much more difficult to explain, is why the TALC has received the continued attention and application that it has over the past two decades. It is unusual, as all academics know, for any article to remain popular and apparently relevant for two decades, especially in social science. One of the authors in this volume, on being asked to contribute a chapter based on an article he had written, com-

mented to the effect that he was somewhat surprised to hear from someone who had actually read the article as he never took it for granted that one's journal articles were actually read [Snepenger, personal communication, 2001], a feeling I imagine most academics share. One might conclude that the TALC has remained accepted because, as Wall [1982, p. 18] commented, it is "elegant and useful." But long-time friend and colleague though he is, he did go on to note a number of difficulties and gaps, some of which have since been addressed, but many of which are still causing researchers problems, as noted in many of the chapters in these two volumes. The reasons probably lie in a few simple realities including that noted by Lundgren earlier. First, the model is simple and easy to use, and able to accept a variety of forms of data. It is intuitively appropriate and provides a conceptual 'hook' on which case studies of specific destinations can be 'hung', a rather valuable aid, especially to students undertaking thesis research and to other researchers examining a specific location. Second, it appeared at a time when concepts and models were lacking but being eagerly sought in tourism as research in the subject moved beyond simple description towards interpretation and analysis. Finally, it has proved capable of modification and adaptation, as shown by the chapters that follow, and as discussed later (Butler, other volume) still has some relevance In the context of concepts such as sustainable tourism and appropriate development.

Postscript

Although it may appear from the previous discussion that Brougham and Butler [1972] coined the term 'resort cycle' before Stansfield [1978], the concept of a consistent process of resort development and change, with recognisable phases or stages, is in fact almost a century older at least. In 1990 I received copies of several articles and letters from dr Bill Dark of the Graduate School of Geography at Clark University in Massachusetts, They ranged in date from 1883 to 1914 and are rather devastating in terms of their implications for supposed academic originality! While too long to reproduce in their entirety, some selected quotations are revealing. The earliest piece, and the initiator of the correspondence which followed, was, according to Clark (personal communication, 1990) an editorial in *The Nation* on July 19, 1883, entitled 'Evolution of the Summer Boarder' by E.L. Godkin, the editor of the paper [Godkin, 1883, pp. 47-48]. Godkin notes that The growth of the American watering place, indeed, now seems to be as much regulated by law as the growth of asparagus or strawberries and is almost as easy to foretell. The place is usually first discovered by artists… or a family of small needs in

search of pure air...' He goes on to describe a process of development beginning with the provision of informal accommodation, followed by advertisement, the conversion of farms to hotels and boarding houses (a stage lasting up to 30 or 40 years according to Godkin), followed by visitation by 'crowds of people.' After this comes the 'cottager' (second home owner), building on land sold by the original farmer, and the boarder moves on to find other 'unsophisticated' farmers. Godkin talks of the 'great summer tragedy of American life', referring to the loss of opportunity for the lower income boarder because of the development of cottages by the more affluent second home owners.

His editorial clearly hit a nerve among residents of the northeast of the USA. The following month a reader sent a letter [C.F., 1883] arguing that Godkin's process was based on a fallacy and that 'The evolution of certain perfidious boarders into the baleful cottager is merely a phase of the phenomenon of this annual migration. The evolution of the summer resort is not necessarily toward cottage life. Saratoga is, quite as logically as Newport, the outcome of this evolution' [as Wolfe, 1952, noted]. C.P. goes on to state that The tragedy, the phenomenal fact, is the influx of large numbers into all the secluded summer nooks, and the consequent destruction of their rural picturesque aspects.' Dislike of the second home owner was stated again in a letter a week later by A.R. (1883) from Bar Harbour, who wrote, on the habit of locals selling property to cottagers, 'each is so busy frying his own little fish that he does not see that the fire on which all depend is already going out.

The discussion begun by Godkin continued for several years in the pages of The Nation, as evidenced in a letter by A.G. Webster in 1914. He wrote in support of Godkin's description of the evolution of resorts, noting that 'The original discoverers have long since had to move on because of the rising scale of prices and the original simplicity of the place is lost... different villages on the island are now showing the successive stages of the development of Bar Harbour.' He discusses the declining fortunes of such settlements, ending with 'automobile weekenders or extreme transients' and concludes that 'while Bar Harbour is in its senescence, Northeast Harbour is in its full maturity.' A few years earlier George Street, in a publication *Mount Desert – A History* [1905, p. 328] pointed out that The development of popular summer resorts on the New England coast has followed a curiously uniform law', supporting the description of Godkin. Finally, in 1915, in an article in the *Worcester Magazine,* Conrad Hobbs [1913, p. 35] began with the statement 'Lake Quinsigamond is now passing rapidly through a history of gradual degradation, which has been the lot of many similar pleasure resorts owned by private individuals and subject to no comprehen-

sive scheme of control.' Hobbs comments that 'the evolution of all the other pleasure resorts of the State confirms me in this belief (p. 35). He describes this process in this manner:

The story of each is roughly, this:

(1) Quiet enjoyment by a few.
(2) Increasing popularity and the appearance of symptoms of abuse.
(3) Rapidly increasing abuse and degradation, leading to a fuller appreciation of its latent but diminishing value and a public demand for its conservation, which, if strong enough and persistent enough, ends In
(4) its final reclamation and protection under strong and efficient control. [Hobbs, 1913, p. 35]

It is both encouraging and depressing to find such statements. Encouraging because they provide evidence and support for the ideas expressed in the TALC about the nature of the process of resort development, the idea of stages, of a consistent pattern or trend, and the inevitability of this process without the intervention of control and regulation. Depressing, or at best, salutary, in the sense that ordinary observant individuals had noted and recorded in print the same process that academics assumed to be their own discovery some half to a full century later!

Postscript to Postscript

In concluding this volume I reviewed the literature cited one last time and. to my embarrassment realised that the idea of a pattern of development of tourist resorts is even older than the postscript above suggests. In their article *A Theoretical Approach to Tourism Sustainability,* Casagrandi and Rinaldi [2002] refer to Gilbert's [1939] article on English holiday resorts. They note that Gilbert cites an article from *The Times* dated I860 discussing the process of resort development:

Our seaport towns have been turned inside out. So infallible and unchanging are the attractions of the ocean that it is enough for any place to stand on the shore. That one recommendation is sufficient. Down comes the Excursion Train with its thousands – some with a month's range, others tethered to a six hours' limit, but all rushing with one impulse to the waters' edge. Where are they to lodge? The old 'town' is perhaps half a mile inland and turned as far away from the sea as possible. But this does not suit visitors whose eyes are always on the waves, and so a new town arises on the beach. Marine Terraces, Sea Villas, 'Prospect Lodges', 'Bellevues', hotels, baths, libraries and churches soon accumulate, till at length of the old borough is completely hidden and perhaps to be reached by an omnibus.

Perhaps fortunately for me the author of *The Times* article did not discuss further development and relocation of resorts, and I end this introductory chapter before I discover how the Romans developed their coastal resort settlements, no doubt following the pattern of the ancient Greeks!

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A Brief Outline of the Academic Achievements of Richard W. Butler and His Contribution to the Development of Tourism Research

Richard W. Butler (1943-) is a world-renowned and frequently quoted academic authority whose interests include many tourism-related issues.

Professor R.W. Butler is a geographer by education. He defended his PhD thesis at Glasgow University in 1973. Merely a few years later he published one of the most frequently quoted concepts of the evolution of tourist regions, presently known by its acronym: TALC (Tourism Area Life Cycle). The publication of the TALC concept and its subsequent development not only brought him recognition and popularity in academic communities around the world; it also swiftly turned Professor R.W. Butler into an acknowledged academic authority and advisor. He joined D. Pearce in editing an oft-quoted book devoted to the problematics of academic research into tourism (*Tourism Research: Critiques and Challenges*).

His professional career has been tied to his work at the Services Sector Management Faculty of Surrey University (Great Britain), the Tourism and Recreation Sector Management Faculty of Strathclyde University (Great Britain), and also the Geography Faculty of the University of Western Ontario in Canada (which he ran for many years). As an outstanding authority on tourism and the development of tourist regions he has also functioned as an advisor for some governmental agencies in Great Britain and in Canada.

R.W. Butler is a founding member and former chairman of the International Academy for the Study of Tourism (IAST), and also a member of many academic societies, including the Royal Geographical Society, the Royal Society of Arts and the Canadian Association for Leisure Studies. For many years he also served as editor of *The Journal of Tourism and Hospitality Research* and a member of editorial committees for seven other academic journals. The research subjects explored by Professor R.W. Butler concern such fields as:

- the evolution of areas of tourist reception,
- development indicators,
- sustainable development in tourism,
- island tourism,
- health resort tourism,
- tourism and the media,
- tourism and safety.

His academic oeuvre includes many works published both in the form of articles and of chapters in collective works, as well as over a dozen academic monographs and collective works of his own.

R.W. Butler's most celebrated article is a work he published in 1980 in *Canadian Geographer*, entitled *The Concept of a Tourist Area and Cycle of Evolution: Implications for Management of Resources.* Here the author described a theoretical model for the evolution of a tourist area, based on a six-phase cycle of development (*exploration, introduction, growth, consolidation, flourishing* and *collapse* or *rebirth*). The model is chiefly based on a symptomatic variable – the number of tourists visiting the area over the course of a year.

R.W. Butler's concept was revolutionary in a number of respects. Over the three decades since its publication, the academic literature has provided dozens of examples confirming its accuracy. Moreover, one finds dozens more articles attempting, with varying degrees of success, to modify the TALC concept. The tourist site development cycle was revised by the author himself twenty years later (*The Resort Cycle Two Decades on*). In the related literature, both in Poland and abroad, we find various explanations of some of the phases; the flourishing phase of a tourist region, for example, is explained by Polish authors as a stagnation phase, citing R. W. Butler's model as evidence. Butler, however, was not speaking of stasis or recession (let alone depression), but the precise opposite – a period in which the financial situation of the area is at its peak. In similar fashion, the development phase has been called the 'growth' phase, and the 'collapse' phase indicates the site's downfall (crisis). Some experts (such as S. Agarwal) have described the phase that occurs immediately after the flourishing phase with the more all-encompassing term 'post-flourishing'.[4]

In 2000 R.W. Butler supplemented his concept with eight more features, and six years after that, he developed the concept further, having collected experiences of other academics using his model.[5] A key addition to his concept was to indicate the weaknesses and virtues that the literature had extracted over the course of two decades, and to put forward concepts to elucidate the causes of development, change, restrictions and interference in tourist areas. Butler lists eight issues under key word headings:

- *dynamism* – change over time – one of the most characteristic traits of tourist activity;
- *process* – a trait characterising changes occurring in the tourist area, facilitating a model depiction of development;
- *tourist absorptiveness and capacity* or *development restrictions* – a model based on the idea that, if the number of visitors crosses beyond the tourist absorptiveness and capacity of the area, the quality of the visitor's experience decreases;
- *initiating factors* – causing changes in the tourist area, e.g. through innovations;

[4] S. Agarwal, *Restructuring Seaside Tourism. The Resort Lifecycle*, Annals of Tourism Research 29 (1), 2002, pp. 25–55.

[5] *The Tourism Area Life Cycle*. Vol. 1. *Applications and Modifications*, Vol. 2. *Conceptual and Theoretical Issues*. R.W. Butler (ed.) Chanell View Publications, Cleveland 2006.

- *management* – it is vital to stress the management of a tourist area as a whole (a complex strategy), as many elements of these areas with their own separate resources and attributes are unmanaged;
- *long-term perspective* – the necessity of a farsighted perspective on an area's development in the initial phases is indicated by the effectiveness of the actions undertaken to defer the 'collapse' phase and of preventative actions, to spur a new revival directly following the stabilisation of the flourishing period;
- *spatial components* – when the development of an area has ceased, the spatial shift of the tourist centre into new areas is recommended – this allows development to begin once more, or to be continued;
- *universal application* – the model has been designed for all tourist areas.

The numerous publications using this concept, following R.W. Butler's model to identify schematic similarities in the development of various tourist areas, have made the model itself undergo constant development. Some articles supply evidence to prove the accuracy of the concept in various parts of the world, and even in various aggregate depictions, while others demonstrate the imperfections of the model and the measures it applies, and still others recommend supplements to it.

Professor Butler's publications have been found in many world-distributed journals, including *Tourism Management, Annals of Tourism Research, Tourism and Hospitality Planning & Development, Tourism Geographies*, *Journal of EcoTourism, Tourism Recreation Research, Current Issues in Tourism, Tourismos, Problems in Tourism, European Journal of Tourism, Hospitality and Recreation, Critical Issues in Tourism, International Journal of Tourism Research,* and *Tourism Recreation Research*.

The latest works to develop Butler's concept involve a multi-levelled approach to the development of a tourist site as a sphere of *conflict* between two social groups: the tourists and the local inhabitants.

Although now retired, Professor R.W. Butler remains a very active academic. In 2010 alone, he published two books: *Giants of Tourism: Key Individuals in the Development of Tourism* and *Political Change and Tourism*. A significant position is held by the above-mentioned two-part work *The Tourism Area Life Cycle*, which he both edited and co-created as an author.[6] It contains the key works on the life cycle of the tourist area. The foundation for this publication is, of course, the TALC concept.

Professor Butler has also written dozens of academic and popular science articles. He often lectures in universities around the world. He has also been active in Poland, participating in some conferences,[7] and even supporting young academics with his thoughts and publishing tourism articles along with them. His pref-

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[6] *The Tourism Area Life Cycle*. Vol. 1. *Applications and Modifications*, Vol. 2. *Conceptual and Theoretical*, Issues. R.W. Butler (ed.) Chanell View Publications, Cleveland 2006.

[7] R.W. Butler's participated, for instance, in the conference organised for the occasion of the 35th anniversary of the Academy (now University) of Physical Education in Krakow. The professor gave a lecture entitled 'Problems in Places of Tourist Reception with Sustainable Development.' The work was published in: *Turystyka w badaniach naukowych*, eds. R. Winiarski and W. Alejziak, Academy of Physical Education in Krakow 2005.

ace, for example, opens the monograph *Uzdrowiska i ich znaczenie w gospodarce turystycznej* [Health Resorts and Their Significance in the Tourist Economy].[8] Therein he describes the reasons for the collapse of many famous resorts, and the changes in the functions of the health resort. He provides examples of the revitalisation of health resorts, such as Banff in Canada, or Bath in England. In the latter case, enormous funds went towards restoring an old health resort – founded by the Romans nearly 2000 years previous – to its former glory, adapting the Roman bath house to modern standards. This has made Bath one of Great Britain's chief attractions. In the modern world of tourism, health resorts play an enormous role in the local economy. They exploit a major trend in today's consumption – care for personal appearance and health (Spa and Wellness), becoming a fashionable addition to exclusive hotels (and not only franchises). Butler correctly observes that things were much the same two centuries ago, when the health advantages of resorts were inflated in order to increase attendance, sometimes by pseudo-medical 'personalities' who had a vested interest in the resort's popularity (as evidence, R.W. Butler cites an opinion by Bowen Devis, local doctor for Liandrindod Wells, a small health resort in Wales, which much resembles a contemporary advertising slogan). At present, hotels add 'Spa and Wellness' to their names as a marketing hook.

R.W. Butler's views on the issue of unsustainable development in tourist areas are also interesting. He notes that the notion of 'sustainable tourism' has two interpretations. The dictionary definition, whereby the term *sustainable* means 'tourism capable of supporting itself on the market in a certain region over an unspecified period of time',[9] thus reflecting the state of the tourist industry. The second interpretation assumes that it is 'tourism developed and maintained in a region (a society or environment) in such a fashion and on such a scale that it remains viable indefinitely and does not cause change to the natural environment to the extent that it obstructs the favourable development and the good of other undertakings and processes'.[10] This second understanding of sustainable tourism stresses the maintenance of the scenery (social, ecological) in which tourism occurs, and not the maintenance of the tourism. It would seem to be closer to Butler's way of thinking, in which tourism inevitably disturbs the ecological balance. In summing up his presentation in 2005 for the jubilee conference for the University of Physical Education in Krakow, he listed three ways of looking at sustainable development. Idealists perceive it as approaching the Holy Grail, touching something practically magical. Optimists treat it as a 'guiding fiction', i.e. something that does not really exist, but which should be aimed for, towards which the tourist reception should strive. The third view defines it as 'pragmatic realism', i.e. using common sense to solve problems of ecological and sustainable social development.

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[8] *Uzdrowiska i ich znaczenie w gospodarce turystycznej*. A.R. Szromek (ed.), Proksenia, Kraków 2010.

[9] R.W. Butler, *Tourism – An Evolutionary Perspective* [in:] J.G. Nelson, R.W. Butler, G. Wall (eds). *Tourism and Sustainable Development: Monitoring, Planing, Managing*. University of Waterloo Press, Waterloo 1993, pp. 25-29.

[10] Ibid, p. 29.

Professor R.W. Butler has also continued to be an active traveller. His journeys are not only tied to his lectures and conference participation, but also to visiting places that are interesting examples of tourist phenomena.

(profile prepared by Zygmunt Kruczek and Adam Szromek)

A NEEDS-FUNCTIONS MODEL
OF TOURISM DISTRIBUTION

*Douglas G. Pearce**

Abstract: This paper[1] contributes to the development of a stronger conceptual basis for the study of tourism distribution by presenting a generalized model emphasizing the needs of tourists and the functions required to meet those needs. The model is developed by synthesizing and reinterpreting a large body of empirical findings from New Zealand in the light of the fundamental principles of distribution drawn from the wider literature. It is structured around the needs, expressed in terms of time, place, form and possession utilities, of three segments – independent, customized and package tourists – and the functions undertaken by suppliers, intermediaries and the tourists themselves in three locations: in the market, en route and at the destination.

Key words: distribution, customers, intermediaries, suppliers, channels.

Introduction

This paper develops a generalised model of tourism distribution emphasising the needs of tourists and the functions required to fulfil those needs. It represents the penultimate stage in a major five year project investigating the structure and functioning of tourism distribution channels in New Zealand. Begun in 2002, the project aims at developing a more systematic understanding of the diverse distribution channels for New Zealand tourism and examining ways of increasing their effectiveness [Pearce, 2003]. Research to date has systematically investigated the structure and functioning of distribution channels for particular markets, regions and sectors; identified the factors that influence the behavior of consumers, suppliers and intermediaries and assessed channel performance in multi-channel distribution systems.

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The final phase of the project involves developing and disseminating best practice guidelines for channel design and channel management. Before this can be done, however, the earlier strands of the research need to be drawn together and synthesized. Synthesis is especially important given the diversity of structures and practices reported so far, together with common themes that are starting to emerge. While some suppliers, especially the larger ones, have a good appreciation of different market needs and have implemented a sound marketing mix, this is not always the case, particularly with many of the small and medium size enterprises that constitute the majority of the country's tourism businesses [Stuart, Pearce and Weaver, 2005; Pearce and Tan, 2006]. One of the more established heritage managers interviewed commented with regard to distribution channels: 'Probably the biggest minus is trying to work it all out… I just feel it should not have to be that complicated' [Pearce and Tan 2004, p. 235]. Developing a more systematic approach to distribution will assist others, especially those seeking to enter the industry, to 'work it all out'; more established operators may find such an approach will help them refine their distribution strategies further, a key consideration in an increasingly competitive and changing environment.

Deriving a model is an effective way of achieving synthesis and providing a systematic basis upon which practical guidelines might be built. While models might be thought of in various ways, the definition proposed by Haggett and Chorley is particularly pertinent in this context: 'A model is… a simplified structuring of reality which presents supposedly significant features or relationships in a generalized form' [1967, p. 22].

More explicit identification of the significant features of tourism distribution and structuring of the relevant relationships in a generalized form will not only facilitate implementing applied aspects of the project but also enhance the conceptual understanding of this complex phenomenon, thereby assisting scholars in this field. In this regard, the model proposed has a wider utility beyond the New Zealand context and makes a timely contribution to the literature of tourism distribution and to that on distribution in general. In a comprehensive review of the broader distribution literature, Frazier called for greater theorization, identified a need for 'Models to be developed to help determine when multiple channels need to be relied on to the fullest extent' [1999, p. 232] and argued that 'Efforts to develop improved typologies of channel systems could have truly significant benefits aiding the maturation of the field' [1999, p. 238]. Tourism distribution is a far from mature field of study. While the seminal work might be traced back to Wahab, Crampon and Rothfield [1976] and other studies appeared intermittently in the 1980s [Bitner and Booms, 1982; Buckley, 1987], it is

only in the past decade that more sustained attention has been given to tourism distribution, including publication of several books [Alcázar, Martínez, 2002; Buhalis and Laws, 2001; O'Connor, 1999]. Much of the literature remains rather fragmented and is not yet underpinned by a strong theoretical foundation.

Various structural diagrams of tourism distribution systems have been presented outlining the channel linkages between providers and consumers of tourism products. These are generally used to illustrate broader discussions of tourism distribution [Alcázar, Martínez, 2002; Buhalis, 2001; Laws, 2001; Middleton, Clarke, 2001; Morrison, 1989; Swarbrooke, 2001; Wahab et al, 1976); to depict the channel structures linking particular markets and destinations [King and Choi, 1999; March, 1997; Pan and Laws, 2002; Yamamoto and Gill, 2002]; or to provide background and show the emergence of new online systems [Hudson and Lang, 2002; O'Connor, 1999; Pavlides, 2006; Reinders and Baker, 1998; Wynne et al, 2001]. Typically, the distribution diagrams depict the links outward from the suppliers to the consumers, directly or via a set of intermediaries; the arrows are almost invariably unidirectional and do not reflect the underlying nature of the linkages. The suppliers and consumers are generally not disaggregated, for example by sector or market segment; rather, the emphasis is on differentiating between levels and types of intermediaries. Most are contextualized in terms of packaged travel, reflecting their setting in either Europe or the emerging Asian markets; little attention has been given to independent tourists except in the online studies.

Moreover, there is often little attempt to go beyond a description of the general or empirically derived structural diagrams and introduce or interpret these from a more theoretical basis. In most cases the discussion is limited to an outline of the functions of tourism distribution followed by an account of the way in which various intermediaries perform these. According to Buhalis: 'The primary distribution functions for tourism are *information*, combination and travel arrangement services. Most distribution channels therefore provide information for prospective tourists; bundle tourism products together; and also establish mechanisms that enable consumers to make, confirm and pay for *reservations'* [Buhalis, 2001, p. 8]. Middleton and Clarke [2002] see the main functions of distribution as extending the number of points of sale or access away from the location at which services are performed or delivered and facilitating the purchase of products in advance of their production.

A few researchers do provide a more theoretical introduction to their research. In their study of the distribution of Japanese ski packages to Whistler, Canada, Yamamoto and Gill [2002] employ the concept of production systems, focus on different types of sectoral linkages, incorporate types of ownership and interpret the resultant structures in terms of globalization

and functional integration. Wynne et al [2001] contextualize the likely impact of the Internet on tourism distribution in South Africa by drawing on the distribution theories of Alderson [1958] and Stern and El-Ansary [1988]. They stress the economies to be obtained by increasing the efficiencies which intermediaries may bring to the distribution process by creating time, place and possession utilities. These may be summarized as:

- adjusting the discrepancy of assortments;
- making transactions routine so as to minimize the cost of distribution;
- facilitating the search process of both buyers and sellers.

Wynne et al then go on to consider the functions performed by such intermediaries as travel agents and inbound and outbound operators. Alcázar and Martínez [2002], Kotler et al [1996] and Ujma [2001] and also draw on the work of Stern and El-Ansary in applying an economic transactions perspective to tourism distribution, though this is not incorporated fully or explicitly in the structural diagrams they use. Ujma complements the economic perspective with a behavioral one, exploring such issues as power and conflict. Considerable scope exists then to develop a stronger conceptual basis to the study of tourism distribution. The needs-function model is presented as one way of achieving this.

A Needs-Functions Model of Tourism Distribution

A systematic and integrated approach to the analysis of tourism distribution has been taken in the New Zealand project [Pearce, 2003] and a large body of empirical research has been completed covering a range of regional destinations, markets, sectors and channel members. Investigation of selected destinations within the country – a major urban centre and gateway, a major resort and a peripheral region [Pearce, Tan and Schott, 2004; Pearce and Tan, 2006; Stuart et al, 2005] – has been balanced by representative market-based studies of New Zealand's three largest English speaking markets [Pearce et al, 2007]; Japan, the largest and most established Asian market [Taniguchi, 2006] and India, an emerging market [Sharda and Pearce, 2006]. Distribution to the domestic market was included in the destination case studies and both international and domestic respondents were included in visitor surveys in Wellington and Rotorua [Pearce and Schott, 2005]. The visitor surveys were designed to extend the range of channel members analysed beyond the suppliers and intermediaries who constituted the focus of the destination and market studies. A broad sectoral coverage has also been attempted. The destination and market studies and the visitor surveys have examined the distribution of accommodation, attractions and

transport; other more specific studies have focused on cultural and heritage tourism [Pearce and Tan, 2004]; adventure travel (Schott 2007), conventions [Smith and Garnham, 2006], events [Smith, 2007], corporate travel [Garnham, 2005] and surface transport [Pearce and Sahli, 2009].

With a view to subsequent comparison across destinations, markets and sectors, a core of common questions was developed that formed the basis of the in-depth interviews which constituted the main means of data collection for the case studies. The supplier interviews focused on the nature of each business, the markets targeted, the distribution channels used, strategies followed, factors influencing these, relationships established and partnerships developed. Similar questions were included for the intermediaries, with particular emphasis on their role in the distribution of New Zealand travel products, while the visitor surveys sought to understand the consumers' information search and booking and purchase behaviour across the transport, accommodation and attractions sectors.

Some integration of this work has already been carried out, for example supplier, intermediary and visitor perspectives have been combined in the Wellington case [Pearce, Tan and Schott, 2004]; the structure of distribution channels in the Australian, British and American markets has been compared [Pearce et al, 2007] and the patterns of distribution for various types of surface transport analyzed [Pearce and Sahli, 2009]. The different parts of the project, especially this integration and comparison, have begun to reveal both similarities and differences across sectors, markets and channel members and patterns have started to emerge which have hitherto attracted comparatively little attention in the literature. A higher level of abstraction is now required of this rich and robust base of comparable empirical data in order to synthesize the project's diverse components, to enable general patterns and practices to be further distinguished from the specific and to develop a more generalized model of tourism distribution. The approach adopted here is essentially to take the key features from the empirical findings and restructure and re-interpret them on a more theoretical basis, going beyond the tourism distribution literature in which most of the project publications and other such studies to date have been set and back to the more fundamental principles of distribution in the wider literature, especially the work of Stern and El-Ansary [1992].

The essence of distribution is captured in Stern and El-Ansary's statement that marketing channels are:

> *sets of interdependent organizations involved in the process of making a product or service available for use or consumption…* not only do marketing channels

satisfy demand by supplying goods and services at the right place, quantity, quality and price, but they also *stimulate demand* through the promotional activities of the units (e.g. retailers, manufacturers' representatives, sales offices, and wholesalers) constituting them. Therefore, the channels should be viewed as an orchestrated network that creates value for the user or consumer through the generation of form, possession, time and place utilities. [Stern and El-Ansary 1992, p. 1-2].

The empirical work from New Zealand illustrates how aspects of distribution and the significance attached to them may vary depending on the perspective of the channel members being considered: consumers, suppliers and intermediaries [Pearce et al, 2005, 2007; Pearce and Schott, 2005]. Wahab et al [1976] and Buhalis [2001] also outline the needs of differing channel members. The emphasis that Stern and El-Ansary [1992] give to demand suggests a useful starting point for considering a generalized model of tourism distribution is the consumer, in this case the tourist, rather than the supplier or intermediary, the most common points of departure in the structural diagrams of tourism distribution noted earlier. Beginning with the demand-side is especially appropriate where the concern is not with the physical distribution of the product (as in the case of manufacturing, the prime focus for distribution studies) but with facilitating the movement of tourists from their home region to the destinations where the consumption of goods and, especially, services, essentially occurs *in situ*. Moreover, as Kotler et al note: 'Designing the distribution channel starts with determining the services that consumers in various target segments want' [1996, p. 473].

Consideration then needs to be given to the functions to be carried out in order to fulfill the tourist's distribution needs. Frazier asserts that 'Channel functions reflect the job tasks… that must be performed within the distribution channel. They represent the basic building blocks of any distribution channel [1999, p. 235].' Channel functions have been variously depicted in the broader literature. In one of the seminal works Lewis argues: 'The purpose of a… "channel of distribution"… is to *bridge the gap* between the producer of a product and the user of it' (emphasis added) [1968, p. 2]. The functions or activities he identifies to achieve this bridging include the transfer of title (buying and selling), the physical movement of goods, the search for markets or sources of supply and the payment of goods. In another early study Bucklin (1966) expresses the services provided by channels as reduction in lot size, delivery time and market decentralization (a fourth, product variety or assortment and depth, is added later [Bucklin, 1972 cited by Stern and El-Ansary, 1992, p. 19]. Bucklin then notes: 'The consumer determines the level of these services he requires. In general, the lower the

level of services provided by the commercial institutions, the greater the relative role of the consumer in the channel [1966, p. 8].' This important point draws attention not only to the consumer but also to the likelihood that the role of different channel members, and thus channel structures, will vary according to the consumer's needs.

In this regard Stern and El-Ansary [1992] assert that while channel members can be eliminated or substituted, the functions they perform cannot be dispensed with but are shifted forward or backward in the channel and assumed by other members. Stern and El-Ansary prefer the term flow to function as it is 'somewhat more descriptive of movement along the channel' [1992, p. 11]. They identify eight 'universal' flows: physical possession, ownership, promotion, negotiation, financing, risking, ordering and payment. The direction of these flows may vary: the first three are typically forward flows from producer to consumer, the next three move in both directions, while the final two are backward flows (from consumer to producer). Channel member specialization in particular functions is also observed.

Drawing on these earlier concepts and principles of distribution, development of a generalized model of tourism distribution thus begins with a systematic analysis of the distribution needs of different tourist segments followed by consideration of the ways in which different channel members might perform the various functions required to meet these needs. The foregoing discussion suggests that while commonalities in needs and functions are to be found variation is also to be expected.

The Model

On this basis the first set of 'significant features or relationships' might be simplified and structured as in Figure 1. The vertical axis depicts the nature of demand segmented by type of travel and major sector while the inter-related utilities and functions of distribution are shown on the horizontal axis.

Tourism demand is not homogeneous; tourists can be segmented in a variety of ways. The focus in the model is on international leisure tourists. The empirical work suggests segmenting tourists according to the way in which they travel and make their travel arrangements is particularly pertinent in terms of distribution. Three basic segments might be identified for the purposes of model building: independent tourists, customized tourists, and package tourists. In practice, the boundaries between these segments are graduated rather than sharp and distinct – different degrees of customization are possible and various types of packages are available. Tourists demand three major categories of services: transport, accommo-

Segment	Sector	In market — Information provision	In market — Assortment	In market — Bundling	In market — Bundling and purchase	En route — Information provision	En route — Assortment	En route — Bundling	En route — Bundling and purchase	At destination — Information provision	At destination — Assortment	At destination — Bundling	At destination — Bundling and purchase
Independent	Transport to	Spec / General and specific	full / Some	None	Few transactions / key-trans	General and specific	Some	Little or none	Some transactions	Specific	Full range/some sorting	Little or none	Multiple transactions
	Transport at												
	Accommodation												
	Attractions												
Customized	Transport to	General and specific	Wider assortment / full	Customized bundling of major products	Single transaction	General and specific	Some	Little	Few transactions	Specific	Full range/ some sorting	Little or none	Some trans / Few trans
	Transport at												
	Accommodation												
	Attractions												
Package	Transport to	General and specific	Range of standardized packages	All inclusive	Single transaction					Some	Limited/ option	Possibly	Optional
	Transport at												
	Accommodation												
	Attractions												

Time, Place, Form and Possession Utilities — Timing and Location of Services Required

Figure 1. A needs-function model of tourism distribution
Source: Own elaboration.

dation, and attractions and activities. Each of these might be subdivided further, for example different modes of transport and transport to or within a destination.

The associated notions of time and place utility discussed by Stern and El-Ansary [1992] might be translated into when and where the various services sought by the different tourist segments are needed. At one extreme are those services demanded and delivered in the market ahead of travel; at the other, those required and provided at the destination. A third set might be drawn upon while en route between the two. Moreover, destinations might be considered at a range of scales from the national to the local; this is especially pertinent when circuit travel by international visitors is significant, as in New Zealand.

Provision of adequate information to tourists in the right place and time is crucial to the whole process, both to stimulate demand and to facilitate the booking and purchase of products and services. Differences are to be found in the type and amount of information which different segments require about various products and services and when this is needed.

With tourism, which essentially involves a multi-service experience, form utility might be considered in terms of whether any particular service is sought and utilized by itself (e.g. a seat on a coach, a room in a hotel or a bungy jump) or whether various travel services are, in Buhalis's [2001] terms, 'bundled' together as in an all-inclusive package tour or a set of customized travel arrangements encompassing transport, accommodation, attractions and activities or some combination of these. Form utility is thus related to assortment and sorting, that is bridging the discrepancy between the assortment or range and quantity of goods and services provided by tourism suppliers and those demanded by tourists. Integrated travel corporations spanning a range of sectors exist but the majority of tourism businesses operates in a single sector and offers a limited range of products and services to a large number of customers. Conversely, individual tourists often require a small amount of a wide range of services. This is especially the case in touring holidays where accommodation and attractions are sought in a number of destinations connected by transport services; other transport services will link the entry and exit nodes on the circuit to the market. Bridging this discrepancy of assortment between supply and demand can thus be a substantial function of distribution.

Possession utility can likewise be seen in terms of booking and purchase – when and where does the tourist need to book and pay for which services; which services require reservations and pre-payment; how are the transactions completed and by whom? The transfer of title (e.g. a plane ticket or hotel voucher) becomes especially important given that tourism is essentially about the movement of tourists rather than products.

Figure 1 can thus serve as a framework by which the distribution needs of the different segments can be examined. Figure 1 highlights the differences that occur between segments, sectors and the amount of distribution activity that occurs in the market and at the destination. In terms of time and place utilities the most pronounced differences are found at the extremes of the bottom left – upper right diagonal, that is, between the in-market and at destination needs of the independent and package tourists. Form and possession utilities between the three segments are also marked; the customized tourists exhibit particular characteristics which have hitherto been generally neglected in the literature in favor of package tourists and, to a lesser extent, independent tourists.

Package tourist are distinguished by their purchase of all-inclusive tour in which all the components of the trip have been bundled together as a single product and sold in a single transaction in the market. These are commonly sold as group series tours, but a variety of individual packages are also available [Pearce et al, 2007]. Information about the destination might have been gleaned from a variety of sources but the choice of the package will be largely based on information provided in a tour operator's or wholesaler's catalogue or brochure. While different types of packages might be offered, particularly with regard to cost and the level of service, there is a high degree of standardization of the component parts (e.g. of accommodation or attractions included). A limited amount of optional sightseeing activities may be offered at the destination but even these might be pre-purchased.

Independent tourists show marked contrasts on all these dimensions. They favor choice, flexibility and spontaneity, arrange all or the majority of their own travel independently of market-based intermediaries and make a series of bookings and purchases, often but not always, directly from the providers at the destination or destinations [Pearce and Schott, 2005]. This behavior is generally information intensive, little or no bundling occurs and destination based distribution may predominate over pre-trip activity in the market. Significant sectoral differences are also apparent. There is advance purchase of outbound air travel as this is needed to reach the destination country (private transport is effectively not an option for travel to New Zealand), but most travel within the destination country is arranged on arrival, especially where a lot of flexible travel is involved and/or public transport is used. Some independent tourists may book accommodation in advance of leaving home, particularly to ensure a place to stay on arrival at a gateway. However, subsequent accommodation is often booked en route as tourists travel from one destination to another throughout the country. Others attend to their accommodation once at a given destination [Pearce et al, 2004; Pearce and Schott, 2005]. Very few attractions are booked and paid for in advance;

most are decided on and purchased once at a destination or possibly en route to it [Pearce and Schott, 2005]. Adventure tourists, in particular, are perceived to be reluctant to commit to a structured itinerary, to have a tendency to make spur of the moment decisions and believe products and prices can be assessed most effectively once at the destination [Schott 2007]. As independent tourists with different needs are making multiple purchases across all sectors, some will appreciate local or en route distribution channels which concentrate and facilitate opportunities for information search, booking and purchase of a wide variety of products. Others will value the convenience or economies which are offered by the bundling together of different products, for example adventure tourism 'combos' such as Queenstown's 'Awesome Foursome' [Schott in press]. In contrast to the package tourists, this bundling and sale largely occurs at the destination rather than in the market.

Customized tourists constitute an intermediate segment and may be individuals or groups. They are distinguished from independent tourists by the extent of pre-purchase from an intermediary (usually in-market) and from package tourists by the fact that the combination of travel products they are seeking and paying for in a single transaction prior to departure is tailormade to meet their requirements rather than already bundled into an existing package or series tour. In terms of assortment, this latter feature generally also means that they are seeking a wider range of products than are made available in the standardized packages [Pearce et al, 2004, 2007]. This is especially so in the case of individuals who, unlike groups, are not constrained by size and consequently may be seeking a more diverse range of accommodation (e.g. bed and breakfasts or lodges rather than hotels), transport (typically groups travel internally by coaches) and attractions and activities of personal appeal.

Pre-purchase of customized travel may appeal as it offers flexibility; provides a large measure of assurance, both in terms of the cost of travel and the knowledge and advice provided by the intermediary; and reduces the information search and transactional efforts of the consumers. These features may be particularly important where relatively expensive long- and medium-haul, 'once in a lifetime' travel is involved [Pearce et al, 2007]; in emerging markets where tourists have little prior travel experience [Sharda and Pearce, 2006] or where language and cultural differences are pronounced [Taniguchi, 2006]. Special interest tourists, especially those traveling in groups, may also call upon knowledgeable intermediaries to customize their trips though some may also do this independently (e.g. fly fishermen and birdwatchers [Stuart et al, 2005; Pearce et al, 2007]. In addition to international air travel, transport within the country may be pre-arranged, particularly for campervans and rental cars and such forms of

transport as the inter-island ferries, scenic railways and travel passes on scheduled or backpacker coach services [Pearce et al, 2007; Pearce and Sahli in press]. Accommodation may also be arranged for most or all of the trip, with accommodation passes being sought by some to provide some flexibility [Pearce et al, 2004, 2007]. Advance purchase of attractions and activities is less common with participation in many of these being decided at or en route to the destination. Exceptions include those with capacity constraints or with a need for advance organization (e.g. participation in multi-day treks or kayaking trips), sell-out events or more expensive 'must do' activities where assurance of availability is needed or pre-purchase is preferred for budgeting reasons [Pearce et al, 2007; Pearce and Tan, 2006; Stuart et al, 2005].

Figure 1 highlights the differing distribution needs of the three segments and contrasts the higher levels of service sought by the package and customized tourists – bundling, reduction of transactions, advance purchase and market decentralization- and the lesser, or at least different demands of independent tourists who tend to assume more of the key functions themselves (e.g. they combine the mix of products they need through a series of transactions) and do not require all functions to be performed in the market.

The patterns shown in Figure 1 have major implications for suppliers. They underline the crucial role of the segments being served or targeted and the influence this has on the inter-related issues of where and when a supplier's products are to be distributed and whether they are to be combined with other products or sold separately. If packaged tourists are part of a supplier's market mix then a mechanism by which a particular product will be combined with others to constitute the package will be needed along with advance distribution in the market. Whatever the sector or region, this invariably means distribution via one or more intermediaries as someone has to put the packages together and make them available in the market. The same is true for customized tourists – for a supplier's product to be part of an assortment available and arranged in the market by a third party, indirect distribution by intermediated channels is required. Conversely, suppliers serving independent tourists need not necessarily distribute their products in market nor have them bundled with those of other suppliers; direct booking and purchase is the norm though information may commonly be provided through other parties. As most suppliers are not dependent on a single segment, the use of multiple channels to reach their customers is common practice and complex distribution systems often result.

Figure 2 provides a schematic representation of the functions involved in the distribution of packaged tours to international visitors, in this case of an all-inclusive circuit tour. The three sets of channel members – consumers,
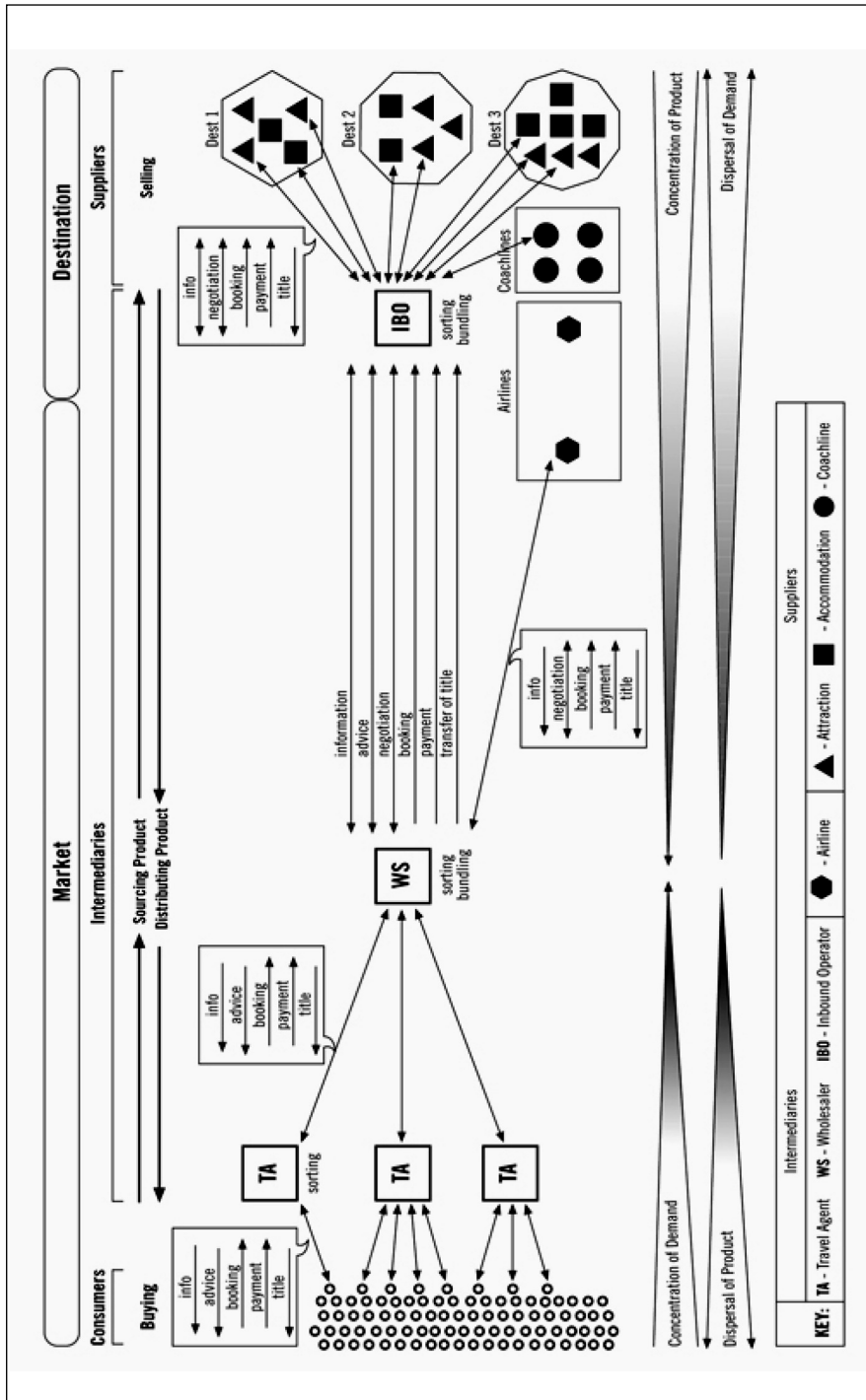
Figure 2. Schematic representation of distribution functions for packaged tours
Source: Own elaboration.

intermediaries and suppliers – are differentiated according to whether they are in the market or at the destination and by the functions they perform: the consumers are buying, the suppliers are selling and the intermediaries, depending on their position in the chain, are in varying degrees both sourcing product and distributing it. The nature of the product – an all-inclusive circuit tour – is the dominant influence in this system. Consumers and suppliers are not interacting directly with each other. Rather, the products of individual suppliers are being combined and sold by intermediaries with a range of other products to consumers who are purchasing a single, all-inclusive product in a single transaction.

The bundling function undertaken to assemble the package is thus central to the whole process. This involves combining air travel to and from the destination country(generally using market- or destination-based airlines), transport (commonly by coach) between a number of local destinations and the arrangement in each of these of accommodation (and often meals) and attractions and activities. Designing the package and sourcing the individual components requires knowledge of what is available, selection of these from a range of suppliers, negotiation of rates, booking, payment and transfer of title. Depending on the number of different destinations in the circuit (five to ten are common in New Zealand), the range of activities included, and the diversity of product available, this can be a complex process.

In putting together the packages the wholesalers therefore commonly rely upon the destination presence and greater familiarity of the inbound operators to facilitate the sorting and bundling process by recommending suitable suppliers and providing advice on the design of the itinerary [Pearce et al, 2007; Sharda and Pearce, 2006]. Inbound operators may also be used to order and pay for the accommodation, touring transport and attractions and activities and subsequently deal with any practical matters which may occur during the course of the tours. Rates will be negotiated between wholesalers and inbound operators and between these intermediaries and the suppliers on the basis of such factors as volume, reliability and quality of service. The destination presence and knowledge of the inbound operators becomes especially important where significant cultural and linguistic differences exist between the market and the destination [Taniguchi, 2006].

Travel agents in turn facilitate the sale of the package to individual tourists. In Bucklin's [1966, 1972] terms, the travel agents enable market decentralization by their dispersed location in sites convenient to the consumer, they enable the purchase of individual seats on a tour (reduction in lot size) ahead of travel (delivery time) and, through making available a variety of different tours, provide the consumer with assortment and depth.

Travel agents also perform key functions in the transfer of title (by way of tickets and/or vouchers) initiating the flow of payment through the distribution system to the suppliers. As it is the transfer of title and then the transport of the tourist rather than the physical movement of goods, issues of storage and the assumption of risk are absent or much less evident in tourism distribution compared with manufactured goods. The travel agent, for example, is selling on behalf of the wholesaler or supplier rather than re-selling products they have already purchased and the distribution of rooms, in the New Zealand case at least, is based on the inbound operator's or wholesaler's allotments rather than advance purchase commitments. However use of intermediaries can reduce some of the suppliers' risks as one Rotorua attractions operator graphically observed: 'I simply don't want to run a worldwide ledger. I'd rather chase some money in Auckland than chase some money in China' [Pearce and Tan, 2006, p. 255].

Figure 2 also depicts the efficiencies that the distribution channels bring in bridging supply and demand. Demand is progressively concentrated throughout the market by the travel agents and wholesalers then dispersed through the multiplicity of suppliers in the destination. Conversely, the product is progressively concentrated (by arrangement rather than physically as in the case of manufactured goods) by the actions of the inbound operators and wholesalers until an all-inclusive package is available for sale in a suburban travel agency to an individual consumer. Other forms of concentration occur in this process. The consumer, for example, is making a single payment for a wide range of services while the wholesaler is invoiced by the inbound operator for all the products used rather than by each of the suppliers separately (a significant saving in time and expense especially where international transfer fees are high). These efficiencies, together with the economies of scale which the associated volume of transactions may bring, can contribute to significantly lower prices for the overall package.

For the customized tourist segment, the allocation of distribution functions is very similar to that shown in Figure 2 except that the sorting and bundling functions are undertaken closer to the consumers and in response to their specific needs, generally by the travel agent. Access to a wider assortment of products is needed to meet the more varied range of individual requirements. In many cases the travel agent will access product through a wholesaler in the same way and for the same reasons as shown in Figure 2, using their product catalogues or travel planners or contacting them directly for advice on less common requests. The role of the wholesaler-inbound operator link in this process may also become even more crucial as one British wholesaler noted: '...if you're doing say a 21 night self-drive

… it's easier for us to go through an inbound because otherwise we then have to go individually to 21 different hotels to get the accommodation confirmed and obviously book the car hire as well . . . Whereas if we did all that through an inbound we can just send one email…' [Pearce et al, 2007, p. 51]. In other instances, especially for hotel accommodation, the agent may access this through some global distribution system (GDS), a centralized reservation office (CRO), or a website, either that of a third-party or of the suppliers themselves. The latter channels may provide real-time confirmation of availability as well as broaden the assortment. The assortment on offer in any channel will, however, rarely reflect the full range of product available; rather the assortment will be limited or structured according to such factors as the perceived demand, product and service quality, the intermediaries' knowledge, the suppliers' distribution strategies and the efficiencies to be achieved in terms of routinely handling a restricted product range and achieving economies of scale by working with a limited number of partners [Pearce and Tan, 2006].

The basic channel system depicted in Figure 2 can be modified, compressed or expanded to give channels of differing depth and structure as functions are assumed by or displaced from particular channel members, that is, they are moved backwards or forwards in the channel [Stern and El-Ansary, 1992]. Wholesalers, for instance, may source their products directly from suppliers, bypassing the inbound operators. This occurs most commonly in short-haul markets where the lesser distances involved result in greater mutual awareness of supply and demand and facilitate more direct travel arrangements compared to more distant and emerging markets. In the culturally complex market of Japan most New Zealand inbound operators facilitate business by maintaining a physical presence in the country, thereby adding another layer to the channel [Taniguchi, 2006].

At the demand end, retail travel agencies may be bypassed as other intermediaries deal directly with the consumer. In Great Britain, direct sellers account for about 80% of the outbound travel to New Zealand. As their name suggests, these intermediaries sell direct to the consumer, primarily by phone through a call centre, with other sales being conducted online or through their own outlets. These direct sellers are primarily destination specialists catering to long-haul customized tourists to whom they are able to offer a high level of service and product knowledge because of the 'concentration of expertise' that they are able to provide [Pearce et al, 2007]. The more rapid uptake of the Internet in the USA is progressively enabling wholesalers there to complement agency sales with direct online distribution; Japanese wholesalers are increasingly targeting consumers through media advertising as well as through travel agencies [Taniguchi,

2006] while wholesalers in India may distribute their products directly at consumer travel fairs [Sharda and Pearce, 2006] In other instances another layer in the channel may be added, as when franchised travel agencies in Australia source their products through franchise group buyers or Indian wholesalers and major travel agencies extend their penetration in a rapidly developing but as yet fragmented market by the use of sub-agents. The roles of the different channel members are often quite clear cut, in other cases the functions are rather blurred. In Australia there is a clear separation of the functions of the wholesalers and retailers, something that is far less evident in India where many of the newly established travel intermediaries have yet to consolidate their role and are actively trying to engage with all segments, retailing and wholesaling, ticketing and packaging.

At destination development can also be elaborated in functional terms. It may both meet the independent tourist's needs for flexibility, spontaneity and wider choice and bring advantages for the suppliers who are able to service or target demand which has already been concentrated geographically, thus obviating the need to reach more dispersed consumers in distant markets. This practice may more readily correspond with the supplier's resources and expertise, particularly in the case of smaller businesses and those, especially attractions, where the absence of capacity constraints and operational requirements do not necessitate advance purchase. In this sense market decentralization has been eliminated, at least in terms of advance booking and purchase. However, as Stern and El-Ansary [1992] observe, key distribution functions cannot be eliminated and at destination distribution may be accompanied by a degree of freeloading. Suppliers who practice an at destination strategy are often very reliant on someone else's efforts, generally the regional or national marketing organization or publishers of guidebooks, to generate demand for travel to the destination in the first place [Pearce et al, 2004]. Some adventure tourism operators in Queenstown, for example, feel that the resort already is sufficiently well known to render their own marketing activity outside of the local area unnecessary (Schott in press). In other instances there is a spatial separation of functions – booking and purchase occur at the destination but selection of the product in question may have been based on advertising or information provided by the supplier away from the destination itself.

While visitors commonly deal directly with the suppliers, local intermediaries, typically a visitor information centre or supplier in another sector (e.g. an accommodation provider making attractions or transport bookings for guests) may be actively used by both independent tourists and suppliers

as it brings efficiencies for both. Use of a local intermediary facilitates consumer choice and transactions by making an assortment of products available for booking and purchase in a single location, together with customer advice and possibly assurance. At the same time, the existence of this assortment in one place concentrates demand from tourists actively seeking services, making the information centre or other local intermediary an efficient location for the supplier's promotional and sales efforts.

Some businesses will seek a competitive edge by attempting to reach independent tourists before arrival at the destination, either by advertising to influence decision making or by encouraging advance bookings and purchase. This is especially the case with circuit travel where en route distribution is practiced in gateways to capture demand on arrival in a country or region and in nodes a night or two away from the destination in question [Pearce and Tan, 2006; Stuart et al, 2005]. As noted earlier, this also meets the needs of independent tourists seeking advance bookings but having differing time-place requirements and reduced levels of service to those carrying out such transactions in the market. Again, use of visitor information centers and other sector providers are common ways of doing this. Chain-owned or franchised accommodation properties may benefit from intra-group referrals or bookings while networked carriers will have their own set of outlets through which bookings for onward travel to the next destination can be made [Pearce and Sahli, 2009]. In many instances, however, intermediaries will be bypassed and the tourist will simply call ahead or book online. Others still may attempt to reach independent tourists before they leave home. Traditionally this has been done mainly by advertising, for example in accommodation guides, or by reliance on word of mouth. Carriers may have their own outlets in the markets they serve. More recently, online channels have opened up distribution opportunities for carriers and other suppliers as well as for consumers and intermediaries.

Consideration of the functions of distribution aids understanding of the changing role of online channels. Potentially online channels offer great scope for bridging the gap between consumers and producers by making travel products continuously available to tourists in the market, en route or at the destination; indeed from anywhere the Internet can be accessed. In practice the impacts of online distribution have been variable and, at least in the New Zealand case, the adoption of these channels should not yet be overstated [Pearce and Sahli 2009; Pearce and Schott, 2005; Tan and Pearce, 2005]. Variation occurs by function, sector and channel member.

In terms of functions it is useful to distinguish between information search, sorting, buying and selling and consider who is performing these functions. Effectively, use of online distribution channels has meant much of

the effort in looking for information and carrying out transactions has been transferred from intermediaries and suppliers to the consumer. The ease of information search is related to several factors including the technology available and the degree of sorting which occurs. Increasingly sophisticated search engines facilitate the search and sorting of information on individual suppliers' websites [Hewitt, 2006] while third-party websites provide varying levels of assortment, depending on whether they serve a particular sector (e.g. transport and accommodation) or destination. While websites may provide a range of information they do not generally offer advice in the same way that travel agents or visitor information centre staff do, nor have they in many instances established the same levels of confidence in tourists as guidebooks [Pearce and Schott, 2005].

Opportunities for booking and purchase also vary depending on the level of sophistication of the online channel. Some, such as those provided by major carriers, hotel chains and e-intermediaries may offer instant confirmation and transaction. Others, for example the online channels of many small accommodation providers, may provide basic information but make provision only for email queries – a phone call will elicit a more immediate response about availability. Online transactions require both a means of making payment by credit card and sufficient levels of trust for consumers to do this, conditions which may not always exist [Pearce and Sahli, 2009; Taniguchi, 2006]. In terms of sectors, extensive adoption of online booking and purchase has been particularly evident in the airline industry, especially with short-haul point-to-point travel, where timing, availability and price are the key factors and where the businesses concerned have had the means to introduce progressively sophisticated systems. These have been followed by major accommodation chains. In contrast, many attractions still use online channels mainly for promotion and information provision, in part because advance booking and purchase are often less necessary, in part because other channels correspond better to visitors' needs [Pearce and Schott, 2005; Tan and Pearce, 2005].

The continuing importance of the more conventional distribution channels for much long-haul international travel to New Zealand can again be explained by contextual factors: the complexity of circuit travel, the tourists' need for the security of experienced advice and financial assurance when purchasing a once in a lifetime expensive product [Tan and Pearce, 2005]. In contrast, the introduction of online point-to-point domestic and short-haul airline sales has met with popular response. These examples again bear out the relevance of Bucklin's [1966] observations with regard to levels of service and the role of the consumer in the channel.

Conclusion

Going back to basics and focusing on the fundamental principles of distribution has enabled a large body of comparable empirical material to be abstracted, synthesized and interpreted more fully. This in turn has permitted a more systematic and comprehensive approach to the analysis of tourism distribution, one that illustrates more explicitly the needs of different segments and the functions that different channel members perform, that demonstrates the necessity to consider more fully the activities that occur in different settings from the market through to the destination and from one sector to another. The needs-function model presented has practical applications and also provides a sounder conceptual basis for further research.

An immediate outcome of this work is that it is perhaps no longer useful to refer simply to tourism distribution *per se*. Rather, a more differentiated approach must be adopted, one that takes fuller account of the tourist segments being served or targeted and their specific needs. While some commonalities do occur, especially in terms of packaged travel where products from the various sectors are bundled together (Figure 2), important sectoral differences have also been shown suggesting accommodation, transport and attractions providers may need to employ varied channel strategies, especially when dealing with independent and customized tourists. Development of best practice guidelines, the next stage in the project, will therefore emphasize the need for individual suppliers to consider more explicitly who they are trying to reach with their distribution channels, what functions are needed to meet their customers' distribution needs effectively and whether these functions are best performed directly or indirectly through one of more intermediaries. Framing channel design questions in terms of needs and functions, understanding how and why these vary and can be modified, rather than merely considering direct versus indirect distribution, types of intermediaries (should an inbound operator or visitor information centre be used?) or channel layers (is a two-, three- or four-layer system best?) is likely to open up a wider range of choice and provide a more considered basis for the distribution decisions taken. Other factors will of course also have to be taken into account, particularly channel performance [Pearce, 2006], but Figure 1 and the resultant discussion of functions should provide a more systematic means of addressing the issue of channel design, especially given the emphasis in recent literature on adopting a more customer-focused approach to distribution [Pumphrey, 2006].

While the model discussed here has been developed in the context of New Zealand, and some of the specifics of the interpretation reflect this (e.g. those relating to long-haul circuit-based travel), the more generalized and

abstract nature of the needs-functions approach could be applied much more widely and through application in a range of contexts enable researchers to move beyond the descriptive to the explanatory. Indeed, its application elsewhere will permit better understanding of the role contextual factors play in shaping distribution strategies for the development of cross-destination or cross-market studies has been hampered by the lack of a more generic framework within which to conduct such analysis. Focusing on needs and functions will also enhance understanding of why changes in distribution channels come about and where they might occur in the future, considerations of significant applied value as well as of academic interest. This is especially true of the impact of continuing technological changes, especially in the ICT field and how suppliers and consumers react to these, for example the use of blogs in online search activities. Scope also exists to build on Figure 1 and develop the approach espoused, for example by further segmentation of visitors; by more detailed examination of their channel behavior with regard to information search, booking and purchasing [Pearce and Schott, 2005] and by analysis of other sectors such as catering and shopping.

Finally, making more explicit links to the wider distribution literature and framing the analysis of tourism distribution in more generic terms means the results of research on tourism can be more readily related back to other sectors and fed into wider disciplinary debates. In this respect it is interesting to note that while issues of multi-channel distribution have only recently been attracting much interest in the broader literature [Frazier, 1999; Coelho and Easingwood, 2004], the use of multiple channels is quite commonplace for suppliers of tourism products due to some of the factors discussed here. In these ways the circle from research on general issues of distribution to sector specific ones and back again might be completed enabling tourism researchers to make more effective contributions not only in their own fields but to also to the understanding broader processes and problems.

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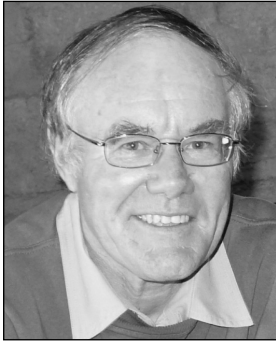
A Brief Outline of the Academic Achievements of Douglas G. Pearce and His Contribution to the Development of Tourism Research

Douglas Pearce received his Bachelor of Arts in 1970 his Master of Arts in geography in 1972, at the University of Canterbury, and his PhD in 1975, at the University of Aix-Marseille II. His MA thesis concerned the patterns and processes of the tourist development at Mount Cook since 1884, while his PhD dissertation regarded tourism development in France. Douglas is currently Professor of Tourism Management at Victoria University of Wellington, New Zealand where he teaches Honours and Masters courses, and supervises students' Masters and PhD theses. Prior to taking up his present position in 2000 he was in the Department of Geography at the University of Canterbury which he joined in 1976, becoming Associate Professor of Geography in 1994. From August to December 1989 he was Visiting Associate Professor at the School of Travel Industry Management, University of Hawaii at Manoa and from October 1995 to January 1996 Associate Professor at the Institut de Geographie, Universite de Paris IV (the Sorbonne).

He is engaged in academic activities, teaching Honours and Masters courses, as well as supervising students' Masters and PhD theses. His research on tourism is wide-ranging, substantial and internationally recognized. His basic research deals with theoretical and methodological issues, complemented by more applied work directed at some problems facing the tourism industry. His major themes of interest include the structure and function of tourist organizations, the planning, development and impact of tourism and destination management. He has also led a major five-year project entitled "Innovation in New Zealand tourism through improved distribution channels", funded by FRST. The research in New Zealand has been complemented by studies in Europe, the South Pacific and Southeast Asia.

He has published over one hundred scholarly papers on tourism, including seven books, which have been translated into French, Italian, Spanish, Portuguese and Japanese. In 2004 he received a *VUW* Excellence in Research Award.

The relevance and practical value of Professor Pearce's work and his standing with the tourist industry and policy-makers is demonstrated by the consultancies he has undertaken for a range of national and international agencies. These include the preparation of tourism development plans for Belize, Sarawak, Sabah and Samoa, where he was the leader of the Tourism Resource Consultants team completing the Samoa Tourism Development Plan 2002-2006. Other projects include a report on

the New Zealand holiday Market for Samoa, an analysis of the impact of casinos on tourism in New Zealand for the Casino Control Authority, and a tourism evaluation project in Croatia for the World Bank.

Professor Pearce is also a Founding Fellow of the International Academy for the Study of Tourism, which is a limited membership international association of leading tourism scholars, headquartered in Hong Kong. He served as vice-president of the Academy in 1996-1997. He is currently on the editorial board of the following journals: *Estudios y Perspectivas en Turismo* (Argentina, since 1994), *Papers de Turisme* (Spain, since 1996) and *Tourism Analysis* (USA, since 1996). His recent keynote lectures and presentations include the following:

– *Tourism distribution channels: a systematic integrated approach*, at the 6th International Forum on the Sciences, Techniques and Art Applied to Marketing (Madrid: Universidad Complutense de Madrid, 27-28 November 2003).
– *Developing competitive urban tourism destinations: international perspectives*, at the International Forum on Tourism Industrialization (Guangdong, 2005).
– *Advancing tourism research: issues and responses*, at the Conference Tourism in Scientific Research (Krakow-Rzeszow, Academy of Physical Education in Krakow/University of Information Technology and Management in Rzeszow, 2005).
– *Desafios y oportunidades en la investgación turística en el mundo*, at the Primer Congreso de la Sociedad de Investigadores en Turismo de Chile (Talca, 2007).

Professor D. Pearce's career is the example of an academic development characteristic of the dynamic and, at the same time, gentle transformation from the issues of classical geography of tourism to the issues connected with a widely understood management in tourism. This confirmed in the professional literature by the publications and widely quoted elaborations concerning, among other things, the problems of distribution in tourism.

(profile prepared by Bogdan Włodarczyk)

DESTINATION BRANDING: BRAND EQUITY, BRAND IDENTITY, BRAND EXTENSIONS AND CO-BRANDING

Metin Kozak, Marica Mazurek***

Abstract: Competitiveness and global forces urge countries to apply the innovative processes in their managerial and marketing activities. Tourism is one example where the managerial and marketing novelties can be implemented, and the examples from the most successful tourism destinations point out at the possibility to benefit from the improvement of managerial strategies and the competitive advantage application. The implementation of branding strategies into tourism destinations, for this reason, can represent a type of the innovative managerial strategy used in tourism destinations. Primarily, the concepts of branding have to be explained in order to grasp the difference between branding in production settings and in tourism destinations. Tourism destinations are the largest brands and their branding is rather a complicated process. Second, this chapter explains the principles of brand leveraging, brand extensions and the principles of brand equity, and brand identity creation. Additionally, the process of branding in tourism destinations requires the consistent and co-operative approach of different stakeholders and entities, service providers, and the application of the rules of co-branding is, for this reason, one of the most effective tools for the innovative strategic approach to branding and marketing in tourism settings.

Key words: destination branding, brand equity, brand identity, brand extensions, co- branding and partnerships.

Introduction

The growing number of new tourism destinations and changing preferences of visitors are forcing tourism destinations to innovate their management and marketing strategies [Kozak and Rimmington, 1999, 2000; Dwyer, Forsyth and Rao, 2000; Ritchie and Crouch, 2005; Hassan, 2000; Jamal and Getz, 1996; Pearce, 1997]. Competing destinations, in order to become

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successful, use not only their existing comparative advantage, but implement competitive advantage tools, e.g. marketing and branding [Kozak and Baloglu, 2011; Heath and Wall, 1992]. In this respect, Dwyer and Chulwon [2003] state that destinations should ensure that their overall "appeal", the tourism experience offered must be superior to their alternative counterparts and be open to attract potential visitors.

Emotional connection and experiential benefits achieved through branding are strong arguments for the implementation of branding practices not only into the production, but also into the tourism destinations' marketing and branding strategies. Some authors [e.g. Murphy, Moscardo and Beckendorf, 2007] still hesitate about the applicability of branding principles to the tourism business, e.g. accommodation, catering facilities. However, some tourism destinations are able to use branding principles in their strategies and benefit from the new strategic approach to tourism development, i.e. Spain, Wales, Western Australia, New Zealand, France, and Italy. This chapter first seeks to refine and enhance the conceptual platform of branding stemming from the product branding in tourism destinations and brand identity characteristics.

The branding principles need to be explained, especially the importance of brand equity and its measurement, which is really complicated in tourism destinations. Several models of brand equity have been discussed in the connection to production, but some authors have tried to apply branding principles and the measurement of brand equity in tourism settings [Cai, 2002; Konecnik, 2004; Boo, Busser and Baloglu, 2009]. The measurement of brand equity complicates the existence of image concept and its measurement difficulties. Dual perspective of image measurement in tourism destination – projected and perceived image requires different methodological approaches. Discrepancies and gaps may occur also between the demand and supply side image perception (congruency of image and self-identity, destination identity). Tasci and Kozak state that "the projected and perceived image could be different and the fit between two would depend on the success of the destination marketing activities, eventually contributing to the consumer satisfaction upon visitation." [Kozak, 2006, p. 304] Another obstruction is a fact that image is a multidimensional construct, which holistic perception and measurement seems to be extremely complicated. Thus, the content of this chapter will secondly discuss the principles of brand leveraging, brand extensions, which mean the use of brand name and logo and the branding concepts for different products and services, offered under one brand umbrella. Discussed will be also the principles of the partnership and co-operation of different stakeholders and their importance for the success of brand and marketing strategies in tourism destinations.

Branding and Destination Branding

Branding has been in use for many years: "centuries ago, branding evolved as a concept of ownership and identification. For example, owners of livestock branded (i.e. burned) their marks onto livestock in order to identify their own livestock and to differentiate it from others" [Blichtfeld, 2003, p. 8]. The contemporary principles of branding in manufacturing were implemented after World War II, but in tourism destinations branding started to be more discussed and used only about 10 years ago. The first academic literature on branding of tourism destinations was published in 2002, in comparison, first publications on product branding appeared in 1955.

Academics, for instance Blichtfeld, argues that "it is too simplistic to apply traditional branding and brand management and/or participate to tourism destination image." [Blichtfeld, 2003, p. 31] A transfer of concepts and theoretical models has been also criticized by academics as Murphy, Moscardo and Beckendorf [2007]. A fact that destination is a place, not a single product, it is more a composite product consisting of different tangible and intangible elements, social, political and economic milieu. Even the best constructed model of brand equity would not provide that type of knowledge for destination managers, which will for example improve their co-operation, co-branding and the use of process of brand leveraging through brand extension. However, a better understanding of branding process and the reasons of successful branding strategies of destinations would be helpful in the creation of tighter relationship with visitors and the improvement of tourism destination economic performance.

Many principles of branding in tourism were originated in the practices of products and services and the simplistic transfer to the tourism destination practices is still under investigation and creates the opportunities for the research of applicability of business practices of classical industries or services into tourism, e.g. the transfer of principles of brand equity into tourism destination branding. Branding as a tool of competitive advantage is based on the principles of value-added effect for customers (demand side) and the equity creation (tourism destinations, demand side). Pike [2005] mentions the future of marketing as a battle of brands. Branding simplifies the visitors' decisions, simplifies the process of segmentation and positioning. It could be understood in tourism destination branding concept as the activity, which is "bringing together two or more adjoining communities of similar natural and cultural compositions and attractions" [Cai, 2002, p. 734].

Tourism destinations are becoming among the largest brands, and their complexity means a challenge for marketers and planners. Buhalis notes that "tourists perceive the destination as a brand comprising a collection

of suppliers and services… and consume it as a comprehensive experience during the visit." [Buchalis, 2000, p. 3] A separation of experience from the physical components and attributes is not suitable for successful branding and marketing processes in a destination. For this reason, overlapping of three components of tourism destination branding [so called holistic approach based on Keller, 1993] – functional (tangible – utilitarian, environmental), symbolic (intangible), and experiential have to be understood, managed and marketed in a synergy.

It is also crucial in tourism destination branding to perceive the branding process in a specific environment, place – micro-environment and macro-environment. For this reason, branding of tourism destinations is not a simple concept and requires strong planning and managerial skills, knowledge of consumer psychology, understanding the process of brand equity creation and its measurement, and also understanding politics in a destination, for instance lobbying.

Brand Equity and Its Measurement

Marketing advantages in the innovative tourism marketing strategies are predominantly rooted in so called "soft values", i. e. emotionally based values, feelings; however, traditional brands in production are connected with so called "hard values" (for example, a function of a product, etc.) Howard Schulz [1997, p. 134], the founder of Starbucks, mentions that "the most powerful and enduring brands are built from heart. They are real and sustainable. Their foundations are stronger because they are built with the strength of the human spirit, no an ad campaign." [Schulz, 1997, p. 134] Emotional attachment and self-expression concept are becoming more meaningful especially due to the growing competition and not only in the classic production and service sector, but also in tourism, which is predominantly represented by the service industry. These ideas have been supported by the authors as Westwood, Morgan, Pritchard and Ineson [1999] and others.

Brand equity as a source of wealth and "added value" has emerged enormous interest among tourism marketers and academics despite of the fact that the concept of brand equity has its roots in the finances, especially accounting and finances. Thode and Maskulka [1998, p. 382] define the positive brand equity in financial content as corresponding to a situation "whenever the producer is able to sell their product at a price above the commodity (bulk) price and the premium price can be attributed to the bond itself." [Thode and Maskulka, 1998, p. 382] However, as Wood points out "the brand construct has proliferated into multiple meanings.

Accountants tend to define brand equity differently from marketers, with the concept being defined both in terms of the relationship between customer and brand (customer-oriented definition), or as something that accrues to the brand owner (company-oriented definitions)." [Wood, 2000, p. 662] Dual approaches to the brand equity creation and understanding also inference the construction of the models of branding and measurement of brand equity.

Brand equity creation could be explained from two paradigm angles – the neoclassical and the relational. Neoclassical approach in marketing is based on the micro-economic perspective with the predominant function of the marketing mix tools; however, the relationship paradigm in branding is becoming a crucial part of the successful marketing strategies based on the innovative approach.

Continual shift from classical marketing and branding theory (production and services) to the place marketing and branding is another change in the innovative approach to tourism destination marketing and branding. This approach enhances the importance of brand equity, relational marketing, "mood marketing", which means the growing importance of consumer-based marketing. Emotional bonds and the motivation are formed on the demand side; however tourism destinations (supply side) are also important for the establishment of favorable conditions to motivate and attract visitors. From the destination perspective, as has been commented by Kozak [2001, 2002], the trip is not a single product; it is made up of components supplied by a variety of organizations with different objectives. For this reason, the process of branding and branding equity creation could be really peculiar and the author added that this fact has an impact on the experiences of visitors. The complexity of tourism destinations, the prevalence of services in the tourism product and their intangible character, the existence of dual approach to branding in tourism destinations from both perspectives complicates the process of tourism destination branding.

Pritchard and Morgan [1996] suggest that a successful brand builds an emotional link between product and consumer and that "mood marketing" is a useful method of destination branding; where brand saliency is created through the development of emotional relationship with the consumer through highly choreographed and focused communication campaigns." Emotional attachment to tourism destinations can be fulfilled via attitudes, attributes of the place, especially through the sophisticated management of the tourism system in a place (place branding and management) and the management of brand attributes, for example natural environment, history, culture, heritage as well as services offered in a tourism destination and their quality.

Measurement of attitudes, attributes, brand loyalty, brand associations, brand image could be achieved through the models of brand equity. The problem with the measurement of brand equity is the complexity of branding and difficulty to use the same methodological approach for measurement from the supply (destination) and demand (consumer) perspective and especially the complication with the measurement of image.

Goodal [1991] stated that the concept of destination image is multidimensional, with cognitive and affective spheres, and has been defined as an amalgam of the knowledge, feelings, beliefs, opinions, ideas, expectations and impressions that people have about a named location, as has been discussed by Henderson. In this case, Henderson developed the idea about the image, which is created by tourists and not the service and product providers at destinations. Image composition needs to respect a specific character of each destination comprising predominantly tourism enterprises offering services, e.g. accommodation, catering, infrastructure, culture, and history. The measurement and understanding of image of these services is multidimensional and could be perceived in different phases of perception – in the pre-consumption stage (belief, feeling, attitude), during a consumption (satisfaction or dissatisfaction) and after the consumption (loyalty, recollection of experiences, new attitudes based on experiences). For the measurement of brand equity could be used several models of brand equity containing also image construct, which have been transferred from the production (Aaker, Keller) or specifically reconstructed for the tourism destination purposes (Konecnik, Cai, etc.).

The concept of brand equity and its measurement is not only based on image; however, image is extremely important for branding. In branding and brand equity measurement we cannot only rely on image, but models of brand equity should also include the brand personality concept.

Brand Personality (Identity)

Some models of brand equity, as for example Cai's model [2002], contain the brand personality and dual perspective (demand and supply side); however, Cai fails to operationalize the model of brand equity, but he understands the role of brand personality in branding because image is crucial in branding, but it is not branding itself. Image is only one step closer and the missing element of successful branding is to grasp a brand personality principle. The creation of brand personality requires the match of marketing, promotion and communication with the core personality elements. Core value is primary advantage of the destination, which is durable, unchange-

able. The problem is that many destinations misunderstand the principle of brand personality, for example they try to copy the successful destinations, which have totally different brand identity.

According to Aaker [1997, p. 347], brand identity (personality) is "the set of human characteristics associated with a destination personality… [and] a destination". The attributes of human beings are implemented into the concept of perception of a destination, and a scale (brand personality scale) defines five elements of destinations: excitement, sincerity, competence, sophistication, and ruggedness (Figure 1).
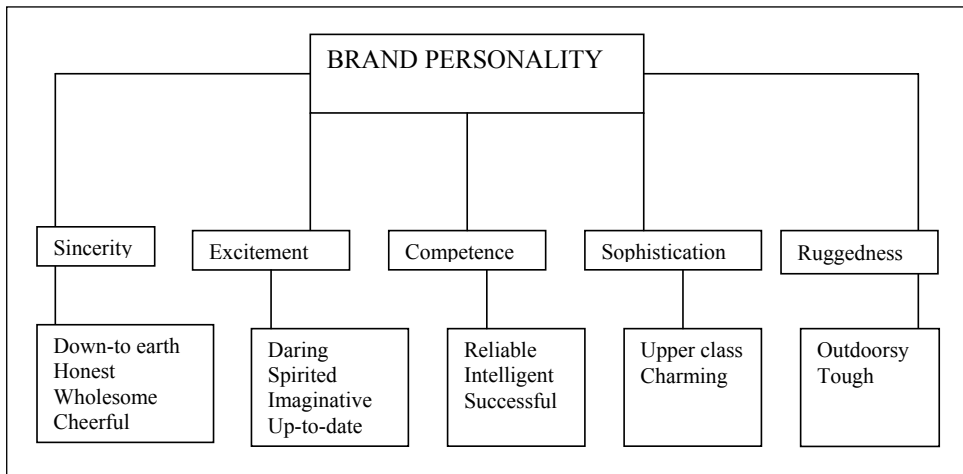
Figure 1. Brand personality scale
Source: Aaker, 1997, p. 352.

Brand identity (personality) evokes emotional links between brands and consumers [Landon, 1974], as has been discussed. As stated in Ekinci and Hossany [2006], it gives the latter a tangible reference point, which is vivid, alive and more complete then the sense conveyed by a generic offering [Upshaw, 1995]. Ekinci and Hossany [2006] limit the attributes to three characteristics: sincerity, excitement, and conviviality. For example, mental construct sincerity means that crucial experiences during a stay in a destination are based on a sincere relationship between hosts and guests. Excitement is connected with the experience of extraordinary, unique and spirited moments, and conviviality means a mix of attractiveness with family values and friendliness.

A positive outcome of the application of distinctive brand personality concepts means better consumer association with a destination, creation of deeper loyalty, the experience of trustfulness. An implication of the brand

personality scale to multicultural environments has revealed that not all cultures respond identically to all dimensions of the scale. For instance, research findings in such different countries as Japan, Spain, and the US point out the common dimensions in all three cultures (excitement, sincerity, sophistication), but they also reveal differences based on cultural origin. For example, excitement means something different in Spanish and Hispanic culture than Japanese one, and more individualistic Japanese citizens may respond differently to the same situation than collective Hispanic people, but it does not mean that Japanese are less excited and that Japan as a country cannot represent this quality in its brand personality (identity) scale.

The first model of tourism brand identity was created by Kapferer [1995, 2004] and this identity prism model includes six facets (Figure 2): physique, personality, relationship, culture, reflection, and self-image. Physique comprises tangible character and means the icon of a destination. Icons can be attractions and buildings, but also unique natural resources, climate, a specific location. For example, an icon could be not only Eifel Tower in Paris or Prague Castle in Prague, Ephesus in Turkey, but also Fjords in Norway or Pamukkale in Turkey. Brand identity is comprised of two components, which Aaker [1996] defines as "core identity and extended identity" (Figure 3); the former is constant in any situation and reliability of image building in branding is based on this characteristics and the latter changes after the implementation of an innovative marketing mix strategy, especially the product mix strategy.
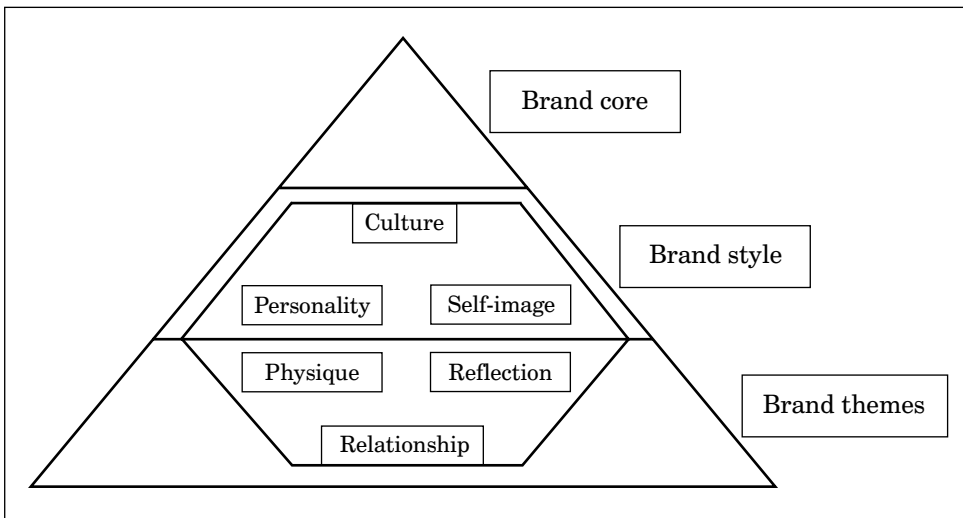
Figure 2. The Brand Pyramid and the Identity Prism
Source: Kapferer, 1995, p. 75.
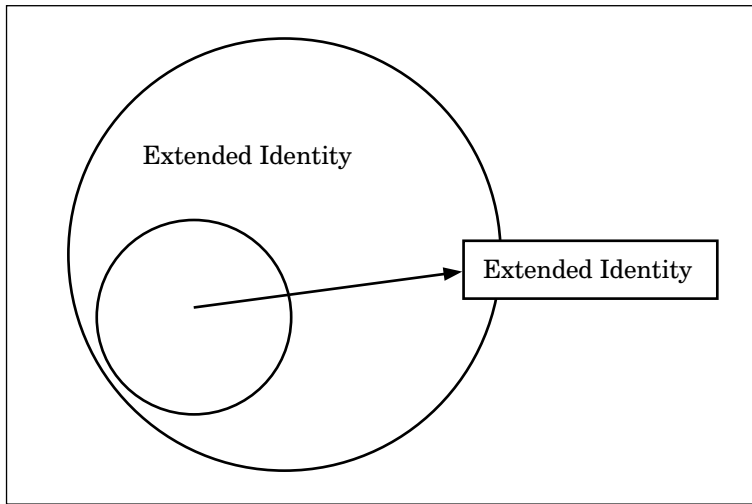
Figure 3. The identity structure
Source: Aaker, 1996, p. 86.

Using an example, core identity (Figure 3) can be exemplified in core personality elements, for example in a case of the Brand Western Australia [Crockett and Wood, 1999] as "fresh, natural, free, spirited". All marketing, promotion, and communication strategies shall comply with these characteristics. The means of verbal and visual communications include features of that core identity. For example, Crockett and Wood [1999] described that in the brand Western Australia were used proper bright colours in order to enhance the visual identity, e.g. yellow and blue for sun and sky. Thus, in this example, one reason for the success in branding Western Australia is trustfulness, consistency, and strengths orientation in the creation and application of a core identity.

The identification of core values is important for brand positioning and communication of brand in the marketing strategies of tourism destinations. Based on the Kapferer´s Brand Identity Prism depicted in the brand system of creation and perception of a brand (Figure 4), brand identity has to be created from the brand core to the bottom (supply side approach), but is perceived from the customer's perception from the bottom, which might be important for stressing the importance of the assonance of both approaches in branding process.

Based on Figure 2 and Figure 4 the brand core (top of the pyramid) is the deep identity of the brand, its core value, which is known and must remain unspoken of and invisible [Kapferer, 1995]. Brand style means how the message about the destination is transmitted by images and written mes-
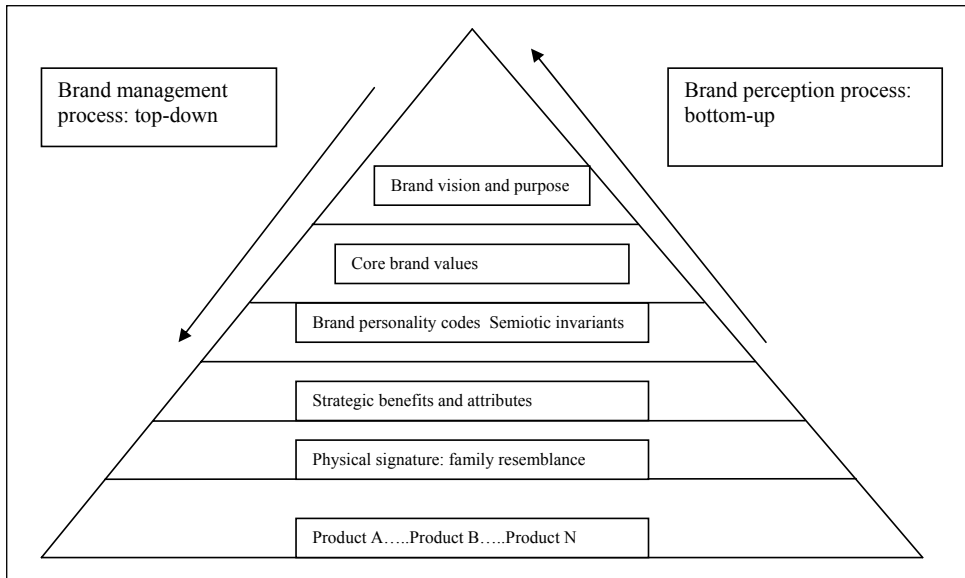
Figure 4. The brand system
Source: Kapferer, 2008, p. 34.

sages and has to be closely related to the core identity. It consists of brand personality (based on Aaker´s scale or might be also less robust depending on the cultural characteristics). Brand culture (authenticity, set of different values inspiring consumers and affecting their image) and self-image (consumer' s feeling about the brand), reflection (defines the potential consumer) and relationship (kinship and attachment based on the unique destination's qualities) are also the components of Kapferer's model. The image consists of the self-image (projected image), which means the image created by marketing a tourism destination and the set of different values inspiring the consumer's image (brand image or perceived image). Core identity and extended identity are two main components of brand identity, which are crucial in the process of successful branding. Kapferer [1995] defines six basic areas which should be questioned in order to define the unchangeable core identity, which tourism destination should follow:

– What is its individuality?   – What are its basic truths?
– What are its long-term goals?   – What are its values?
– What is its consistency?   – What are its recognition signs?

Pike [2005, p.179] defines brand identity as "the self-image and desired market image, while the brand image signifies the actual image held by consumers." The ideal outcome for a tourism destination and visitors would be

a synergy of both perception and mutual consequence on images; however, overlapping of both perceptions is not a rule. Successful destinations applying branding concepts have to be consistent and loyal to their real identity because there are three possible views in this concept stating that identity means the actual state (brand identity), profile is what a destination wants to present (in marketing strategies, communication) and the image is what visitors think about a destination.

Creation of brand image and brand identity requires a consistent and systematic approach and may last for years to establish brand image and name recognition and develop strong awareness of a destination product [Morgan, Pritchard and Piggot, 2003]. The authors continue that "this is why the same destinations (such as Ireland and Spain) are constantly cited as classic examples of cohesive, long-term branding – because they are rare breed and succeed against the odds" [Morgan, Pritchard and Piggot, 2003, p. 288]. Success could be, in some cases, not only trend and novelty; it could be a loyalty to the traditional values and attributes implied in new marketing strategies and branding.

Destination loyalty, unfortunately, has been not studied very often. Several authors underline the importance of loyalty in branding, which influences the repetition of visitation [e.g. Opperman, 2000; Gitelson and Crompton, 1984]. Crucial in the concept of loyalty is the fact that even if visitors do not repeat a visit, their interpretations of personal experiences in destinations can be helpful in marketing and promotion. Destinations which continuously compete over visitors must be aware of this fact as well as continue successfully in positioning themselves against other competing destinations. One possibility in strengthening brands is the brand leveraging and extension process.

Brand Extensions

Building strong brands and brand extensions for example through events, new tourism products and services might benefit the core brand equity of a destination. Process of brand leveraging and extension is extremely important also in tourism destinations because it could influence the image and the fulfillment of brand promises. Favorable brand associations with the brand improve the brand perception and brand equity, which enable in tourism destinations to increase the number of visitors and the amount of income (multiplication effect). Brand leveraging and brand extension concepts tend to strengthen brand equity, brand value, reputation of destination, the core brand if visitors are able to create strong attachment to the

brand. Various academics underline the importance of research on tourism brand extension and innovation management, especially with the focus on the development of innovative destination strategies [e.g. Buhalis, 2000; Hankinson, 2005].

The theories of categorization [Barsalou, 1985] and theories of schema-triggered effects [Fiske and Pavelchak, 1986] have influenced the research of brand extensions, especially as stated by Thorbjornsen [2005] in fact that attitudes and beliefs change in response to brand extensions that vary in terms of congruence with the person's existing category or schema; and that these changes occur via the process of assimilation and accommodation.

Assimilation means similarity and congruence, and accommodation means the difference, which requires implementing more pressure in the assimilation of the extended brand to the parent brand. Congruence and assimilation mean, for this reason, a positive influence on the success of branding strategies and even in tourism destinations the congruence of beliefs and attitudes of visitors and the diminishing of gaps between the tourism experience and the destination promises might have enormous influence on the destination marketing success and performance.

The information and motivation are important factors influencing the success of branding; however, also the mastership of leveraging of brand and creation of brand extension and using properly brand in the destination promotion and activities are adequately meaningful. For example, if
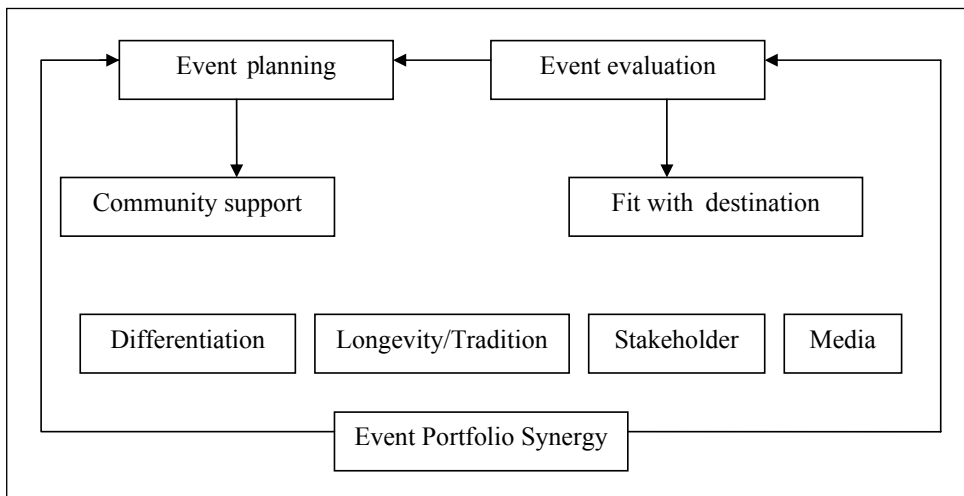
Figure 5. Model for Planning and Evaluation an Events' Contribution to Destination Branding

Source: Jago et al, 2003, p. 7.

the promise of a destination is to be a place for family vacation and it might be incorporated into the branding strategy as a place cheerful and sincere, the experience of the crime and instability might ruin the image. Similarly, some events organized at that place might be more suitable for that destination using in its brand identity a feature of cheerfulness and sincerity. For example, the circus with animals would be more suitable for that type of destination as the organizing of racing or rodeo competitions. Jago et al [2003] provide a specific model for planning and evaluation of events' contribution to the branding of destinations (Figure 5).

Such elements as community values, support, co-operation with community and local image are decisive points in the creation of successful branding strategies. It means that promising something to visitors, which is not evident in a community or cannot fit there, is an avenue to dissatisfaction. In the process of leveraging of brands in tourism destinations and offering new services or activities, events in a destination, promise and strict destination branding concept has to be taken into account and even communication with visitors via different media or social network as a result of innovative destination marketing and management strategies has to avoid the danger of mistrust and mislead information, which could undermine the image of a destination.

Co-branding and Partnerships

Co-branding and creation of partnerships in tourism destinations have been recommended by academics [Prideaux and Cooper, 2002; Telfer, 2001; Cai, 2002] because with common vision and synchronization of branding and marketing processes the implementation of branding will be easier and more effective. The idea of strong brand umbrella (destination brand family tree) and the co-ordination of activities of destination under the same brand concept (logo, slogan, brand identity, mission, vision, values, etc.) are crucial in brand extension and co-operative branding concept.

Process of branding in tourism destinations is influenced by primary (natural resources) and secondary sources (infrastructure, superstructure, culture, history, etc.), but also by external conditions of macro-environment (economic, political, social, etc.). The existence of private and public sector and different managerial approaches also complicates the process of branding.

Consequently, the character of tourism product, the influence of not only attractions and direct tourism services, but also support infrastructure and services have significant impact on the success of branding strategies. Morgan and Pritchard [1998] mention that destination managers might

cope with significant obstacles during the implementation of marketing and branding strategies in destinations, especially three unique challenges: *a lack of control over the total marketing mix, their relatively limited budgets, and often, over-arching political considerations* [Pritchard, p. 215]. The co-operation and strategic marketing (creation of strategic alliances), strengthening the role of DMOs in a destination and branding are important for tourism destination competitiveness and success.

The authors explain that destinations need to bring together all parties to collaborate rather than to compete, and to pool resources toward developing an integrated management and delivery system [Fyall and Garrod, 2005; Prideaux and Cooper, 2002; Telfer, 2001]. Important roles in this goal have destination marketing organizations (DMOs), and based on King [2002], their role is to pursue strategic relationships with partners in order to deliver an extraordinary experience to visitors.

Experience and relationship in branding have strong impact on the success of destinations, which can be later turned in the repetitive visitation or creation of positive image. Cohesiveness and co-ordination for example in building and maintaining a consistent positioning strategy is not easy to pursue, but without common vision and synchronization each stakeholder can see different position or follow different goals. For this reason, as Fyall et al. argue commented, "collaboration is likely… the *sine qua non* for successful destination marketing". [Fyall et al., 2006, p. 83] Creation of partnerships in destinations improves competitiveness and relationship of visitors to destinations, and consequently enables the implementation of effective marketing and branding tools. Partnerships cannot be understood to be a result of branding because branding concepts, as being explained above, have a specific role in marketing, but partnerships and DMOs applying branding in their practice could improve the implementation of branding principles and creation of better relationship between visitors and destinations. As a result, such destinations have a better chance to perform more successfully and achieve their goals in tourism more quickly.

In studied journals, some cases reveal different obstacles in branding principles application at the level of DMOs. For instance, the branding strategy can be negatively perceived by local residents, as mentioned by Henderson that "New Asia – Singapore brand did not match the experiences of local residents." [Henderson, 2007, p. 267] DMOs play an important role in the creation of a contact with visitors and by the implementation of specific visitor programs can improve brand loyalty and repetitive visitation.

Creation of partnerships in destination can also improve the funding process and simplify the availability of finances for marketing and promotion purposes. However, it is important to conclude that "a successful brand

campaign leading to increased yields for local businesses do not translate into increased revenue of DMOs" [Pike, 2005, p. 181]. The idea of partnerships in order to improve branding in destinations has been developed also in Western Australia and especially in their attempt to establish advisory councils in order to support marketing [Crockett and Wood, 1999]. Success of branding depends also on understanding the concepts by governments, not only destinations and DMOs. Similarly Henderson discusses about the success of branding and tourism in Singapore:

> branding has been conducted within a supporting framework of strategic tourism planning... and Singapore past tourism development and strategies... signify government willingness and ability to support tourism and undertake long-term planning. [Henderson, 2007, p. 269]

Conceptual planning and financial support enable Singapore to achieve competitive position and to gain new businesses and events [Henderson, 2007]. Similar experiences have been discussed in New Zealand case by Morgan, Pritchard and Piggot [2003, p. 298] stating that while residents and the internal industry constitute the destination experience, tour operators and wholesalers, airlines and other destination marketers are the bridge between the destination and the tourism market and more bridges certainly need to be built between those who practice and those who comment on brand management. For this reason, an orchestra which plays a synchronized music under the leadership of all partners might be a good example of successful destination in tourism branding, where all partners attempt to play in the unison melody depicted by the marketing strategy of a destination.

Conclusion

The brand equity, brand personality, co-operation and brand umbrella concepts as well as leveraging of brands through brand extensions and building strong association of visitors with a brand are the components of successful strategies applied in tourism places and in tourism businesses. Tourism as the predominantly service sector phenomenon could implement and use branding strategies leading to the increase of competitiveness among destinations.

Branding in tourism can create a powerful marketing tool for destinations. A communication process selling the image of destinations tends to be more powerful through co-operation. Combining the offer of tangible prod-

ucts and predominantly intangible services by using strong segmentation and communications' means, and especially by creating an emotional attachment with visitors, a marketing strategy is the strength of a successful destination. Such destinations do not hesitate to revive and create attractive offer in the right dimensions of time, place and focused at the suitable customers.

Construction of a proper message and fulfillment of promise is an enormous crucial task in branding of destinations offering predominantly service based products. Berry comments that "service companies build strong brands through branding distinctiveness and message consisting by performing their core services well, from searching customers emotionally, and by associating their brands with trust." [Berry, 2000, p. 130] Consistency means to be trustful in messages, images, events, which might be transmitted or organized in tourism destinations. Similarly, human participation in branding process seems to be even more crucial as all concepts woven into branding strategies because emotional links are mostly built up through people and their participation and touch. For this reason, destination branding is extremely complicated and so different from branding of products. The future winners in entrepreneurship include destinations which will be able not only to use innovative tools of management in order to achieve competitive advantage (e.g. e-marketing, customer relationship marketing and customer centric marketing), but will also be able to become friends for life through the experiences (based on the experiential economy) of visitors discovering unforgettable destinations.

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A Brief Outline of the Academic Achievements of Metin Kozak and His Contribution to the Development of Tourism Research

Metin Kozak graduated from the School of Tourism and Hospitality Management, Cukurova University, Turkey (June 1991). He obtained his Master's degree in tourism management from Dokuz Eylul University, Turkey (August 1993). As part of his dissertation, he examined the impact of various supply-related factors on international tourism demand in Turkey. He holds a PhD in tourism from Sheffield Hallam University, UK (September 2000). He examined the applicability of the benchmarking approach to international tourist destinations using several criteria such as facilities, tourist satisfaction and tourist expenditure. Having been undertaken both in the Turkish and Spanish resorts, this work was nominated among the best three PhD dissertations for the TQM award, an international award given by the European Foundation for Quality Management for the best thesis in TQM, recognising an outstanding contribution to the further development of TQM, learning value for management, and degree of innovation and applicability of the findings.

Metin Kozak has published over 70 papers in several international pure management, tourism and hospitality journals, both in English and Turkish, and presented over 40 papers at various international conferences on tourism, hospitality, regional development, international management, and international marketing and held in UK, US, Denmark, Canada, Portugal, China, Switzerland, Greece, Croatia, Spain, Australia, Austria, Ireland, Iran, Italy, Malaysia, United Arab Emirates, Netherlands, Germany, Japan, South Korea, Poland, Thailand, and Turkey.

His main research interests focus on consumer behaviour, benchmarking, performance measurement, competitiveness, cross-cultural research, destination management and marketing, European tourist markets. He has several papers in such esteemed journals as: *Annals of Tourism Research*, *Journal of Travel Research*, *Tourism Management*, *Leisure and Society*, J*ournal of Travel and Tourism Marketing*, *Journal of Vacation Marketing, International Journal of Tourism Research, Journal of Sustainable Tourism, Tourism Review, Journal of Tourism and Hospitality Research*, *Tourism Analysis*, *Cornell Hospitality Quarterly*, and *Anatolia*. He is the author of a book on *Destination Benchmarking* [CABI, 2004], co-editor of *Progress in Tourism Marketing* [Elsevier, 2006], *Handbook of Tourist Behaviour* [Routledge, 2008], *Tourism Econ*omics [Nova Sciences, 2008], *Advances in Destination Marketing* [Routledge, 2009], co-author of *Managing and Marketing Tourist Destinations*

[Routledge, 2011] and co-author of some others in Turkish as *Introduction to Tourism* [2011], *Tourism Economics* (2010), and *Competitiveness in International Tourism* [2005].

Over the past 10 years, Metin Kozak has been involved in the editorial team of *Anatolia*, where he is now acting as an editor-in-chief. He is currently an editorial board member of over 25 journals, including *Annals of Tourism Research, Tourism Analysis*, and so on. In addition, he has served as an *ad-hoc* reviewer for many other tourism, hospitality and leisure journals. In 2008, he was invited to become an alumni contact in Turkey for the graduates of Sheffield Hallam University.

Metin Kozak also has extensive experience in taking part in the organisation of various tourism and hospitality conferences, e.g. Advances in Tourism Marketing Conference, Graduate Research Conference in Tourism and Hospitality, European Tourist Research Centre Conference, and International Academy for Studies of Tourism etc. He is the founder of the first two conferences above. He is currently working as a co-chair of two forthcoming international tourism conferences: *6th Graduate Research Conference* (to be held in Turkey, 23-27 April 2012) and *5th Advances in Tourism Marketing Conference* (to be held in Portugal, 5-7 September 2013).

Currently, Metin Kozak is Professor of Marketing in the School of Tourism and Hospitality Management, Mugla University, Turkey. As a Research Fellow, in 2005-2006, he was affiliated for a year with the Department of Marketing, Faculty of Economics and Social Sciences, University of Namur, Belgium. On the one hand, he is involved in several tourism-based national and international research projects, particularly with his partners based in Europe and the US. Developing such partnerships has resulted in publishing quality journal papers, conference presentations and chapters in books. On the other hand, he has been invited as a guest lecturer to conduct seminars or lectures at various universities, e.g. University of Balearic Islands (Spain), Sheffield Hallam University (UK), Oxford Brookes University (UK), Brock University (Canada), University of Esfahan (Iran), Lulea University (Sweden), University of Valencia (Spain), Kodolonyi Janos University (Hungary), University of Namur (Belgium), College of Charleston (USA), University of Algarve (Portugal), and National Chai University (Taiwan), University of Peng-hu Island (Taiwan), Assumption University (Thailand), and University of Applied Sciences (Finland).

Following his successful career (since the approval of his PhD degree), Metin Kozak has received two awards to mark his achievements. In 2001, his PhD dissertation on benchmarking was nominated by the EFQM-EU. In 2004, by a committee of the Turkish Tourism Investors' Association, he was awarded the grand prize of tourism researcher of the year 2003 in Turkey. As of September 2011, his works have received approximately 400 citations in SSCI-referenced journals. Recently, Metin was ranked among the top 25 most prolific tourism researchers worldwide in terms of the number of publications from 1985 to 2004 (Zhao and Ricthie, 2007) and from 2000 to 2009 (Park, Phillips, Cantr and Abbott, 2011). He was also ranked among the top 50 most prolific scholars in terms of the frequency of articles cited widely in international journals [McKercher, 2008].

Metin Kozak is currently among the most cited and esteemed scientists in the field of tourism destinations marketing, and has made special contributions to the concepts of destination benchmarking, destination image, destination competitiveness and tourism service quality. However, his special position among tourism researchers also reflects his spectacular activity as an animator of scientific activities involved in the organization of many important and successful scientific events and his name is perceived as a guarantee of a high quality conference.

(text edition by Michał Żemła)

A STRUCTURAL REVIEW OF THE EXTENT OF ACTUAL AND POTENTIAL LEAKAGES / LINKAGES IN CARIBBEAN TOURISM

H. Leo Theuns*

Abstract: The majority of countries/ territories in the Caribbean is highly dependent on tourism as a source of income and employment. To attain maximum benefits from tourism development governments are urged by international aid donors to reduce leakages of gross tourism receipts and increase linkages of the tourism sector with other sectors of the national economy. A structural review of the inherent characteristics of Caribbean countries/ territories shows that this may be an unworkable advice. Many countries may be better off simply promoting upmarket tourism in order to maximise gross receipts, thus also maximising net receipts from tourism.

Key words: economic impact assessment, gross tourism receipts, direct and indirect imports, GDP, direct and indirect factor income transfer, national income, tourism operating account, leakage, linkages, Caribbean, size of nation, level of structural transformation, economic growth and economic development, types of tourism, policy implications.

Conceptual and Measurement Issues in Economic Impact Assessment

The tourism sector consists of those units in the economy that share a common function or output with regard to the production of goods and services to be consumed by visitors or travellers. Seen from the supply-side the tourism sector can thus be defined as "the aggregate of all businesses that directly provide goods or services to facilitate business, pleasure and leisure activities away from the home environment" [Smith, 1988, p. 183]. The components of tourism are many and diverse. Because of this heterogeneity tourism is not represented in the International Standard Industrial Classification of All Economic Activities (ISIC) as a separate entry [UN, 1968]. The constituent parts of the tourism product are spread over several major divisions and within these again several groups of activities. At least four major divisions of ISIC contain elements of tourism:

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- major division 6: Wholesale and Retail Trade and Restaurants and Hotels;
- major division 7: Transport, Storage and Communication;
- major division 8: Financing, Insurance, Real Estate and Business Services; and
- major division 9: Community, Social and Personal Services.

Travel agents are to be found in group 7191: Services incidental to transport. Air transport constitutes group 7131: Air transport carriers. Restaurants, cafés and other eating – and drinking places are part of group 6310, which also comprises catering. Restaurant facilities that are combined with lodging facilities are classified as group 6320: Hotels, rooming houses, camps and other lodging places. Hence tourism as such is not discernible as a separate activity in standard national accounts.

The complexity of classification is compounded by the fact that some tourist enterprises cater for international tourists and same-day visitors, as well as domestic tourists, domestic same-day visitors and the local population.

Radke et al choose an easy way out by defining tourism as "those establishments whose services are bought primarily by tourists". [Radke et al, 1975, p. 4] In an effort to refine this rather crude delineation Smith makes a distinction between two tiers. "Tier 1 firms are those that would not exist in the absence of travel. Examples include hotels, airlines, cruise ships, and travel agents. Tier 2 firms are those that would continue to exist in the absence of travel, but only in a diminished form. These businesses include taxis, restaurants, rental car agencies, gift shops, and attractions and events". [Smith, 1989, p. 32] Whether this produces an acceptable degree of precision is debatable. To arrive at a precise assessment of the economic effect of incoming tourists and incoming same-day visitors the total turnover generated should be split according to categories of demand based on origin. Subsequently a proportionate share of gross receipts and costs, including imports, should be allocated to incoming tourists and incoming same-day visitors, which is a rather cumbersome procedure.

In early analyses [Ogilvie, 1948; Lickorish, 1953] much attention was paid to gross expenditures on / receipts from international travel, and the tourism or travel balance as part of the services balance in the current account of the balance of payments. The tourism or travel balance records at the credit side the receipts from export of tourist services and at the debit side the expenditures for import of such services, with as a result a surplus or a deficit ("travel gap"). However, "in the context of efforts to increase receipts from tourism it is not the offsetting outflow caused by residents which is relevant, but the foreign exchange resources devoted to obtaining the revenue from tourism in the first place, which are recorded as debit entries mainly in other items of

the balance of payments" [UNCTAD 1971, p. 20]. To take these concomitant foreign exchange effects of incoming tourism into account Baretje and Defert [1972] devised a tourism operating account. The items represented in this tourism operating account are shown in Table 1.

Table 1. Tourism operating account for incoming tourism

Outlays / Debits	Proceeds / Credits

1. Merchandise imports on behalf of tourism
  a) Merchandise imports by the tourism sector itself (direct imports);
  b) Merchandise imports by the supplying sectors (indirect imports)
2. Expenses on tourism training abroad
3. Expenses on tourism marketing abroad
4. Transfer of labour income abroad
5. Transfer of capital income abroad (interest and dividend on foreign direct investment in tourism)
6. Transfer of amortisation of invested foreign capital
	1. Tourism receipts (expenditure by foreign tourists in host country)
	
	2. Payments by foreign tour operators for services bought in host country (accommodation, ground operators, air charter operators, port authorities)
	
	3. Fare payments by incoming tourists to air carriers of the host country.*
	
	4. Foreign direct investment in tourism facilities in the host country

Credit balance = Net foreign exchange effect	Total proceeds = Gross foreign exchange effect

Note:* Although existing IMF tradition stipulates otherwise, international fare payments constitute an integral part of tourism. Leaving them aside would lead to an incomplete and distorted picture of the economic impact of tourism.

Source: based on Baretje and Defert, 1972.

Debit entry 1 consists of direct and indirect imports of tourism. Direct imports are imports consumed directly by foreign tourists or used directly by the tourism sector. Indirect imports are imports by domestic producers in other sectors, as far as the final product is supplied to the tourism sector.

The tourism operating account can be considered to be the forerunner of the tourism satellite account (TSA), for which in the 1990's the concept and detailed guidelines were developed by the World Tourism Organization [WTO, 1999; WTO, 2000a; WTO, 2000b]. The standards for the establishment of satellite accounts have been approved by the United Nations in 2000. The effective implementation of a TSA requires an extensive set of reliable statistical data, making it a time consuming and complicated task to fulfil. In view of this one may wonder whether the sigh uttered by Dziedzic [2005, p. 209] "Sophisticated methodologies are often expensive and sometimes are not justified by the results", shouldn't be applied to the efforts to establish a TSA. Similar to the tourism operating account the TSA focuses only on the effects of the first round of spending, thus leaving aside induced

effects. Unlike the tourism operating account the TSA limits its attention to value added by tourism, in other words the contribution of tourism to GDP. In order to arrive at the contribution of tourism to national income a further hurdle has to be taken, consisting of measuring and deducting direct and indirect factor income transfer.

The relation between gross receipts from tourism and the primary national income effect can be visualised in a flow chart for (differential) economic impact analysis, as given in Figure 1, and be expressed in the following formula:

$Y_{nat} = E_n = E_g - [(I_d + I_i) + (Y_{dt} + Y_{it})]$, in which

Y_{nat} = total primary national income effect

E_n = net foreign exchange effect

E_g = gross foreign exchange effect

I_d = direct imports

I_i = indirect imports

Y_{dt} = direct factor income transfer

Y_{it} = indirect factor income transfer

The equation demonstrates that what ultimately counts is the net foreign exchange/primary national income effect and not the gross receipts from tourism, for not all money spent by tourists and/or tourism operators contributes to improving the balance of payments/income position of the host country. Part of the revenues is spent on imports by the tourism sector and part leaves the country through imports needed in the production of goods sold as inputs to the tourism sector (inter-industry transactions).

Deduction of these imports from gross foreign exchange receipts results in the direct primary domestic income of the tourism sector and the income generated indirectly (through linkages with the tourism sector) in the intermediary sector. Part of this domestically generated value added leaves the country directly in the tourism sector and/or indirectly in the intermediary sector by way of factor income accruing to foreign residents which is transferred abroad. Deduction of these transferred factor incomes results in the direct primary national income effect of the tourism sector and the indirect primary national income effect from tourism in the (aggregated) supplying sectors. Taken together this results in the total primary national income effect or net foreign exchange effect of tourism.

The volume of net receipts from international tourism is determined by many variables. To start with, the volume of gross receipts is of overriding importance. Imports of consumer and capital goods for the tourism sector and the intermediary sector subsequently make for leakages resulting in a lower contribution of tourism to GDP, both directly in the tourism sector and indirectly in the intermediary sector. Repatriation of profits, transfer
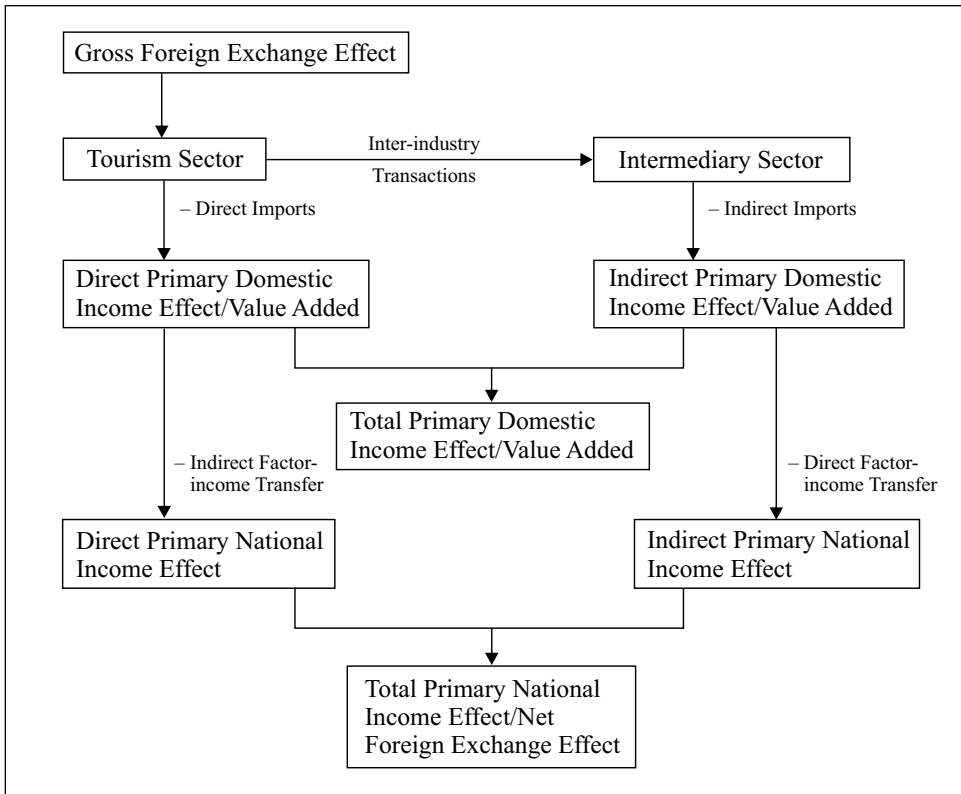
Figure 1. Flow chart for economic impact analysis
Source: Theuns, 1991.

abroad of interest payments, transfer abroad of amortisation on invested foreign capital, and transfer of labour income by expatriate staff constitute a further drain on income, resulting in a lower contribution of tourism to GNP, being the income that becomes available, directly and indirectly, for spending by the country's resident population.

Leakages and Linkages

Leakages and linkages are each others opposites: the more extensive the linkages, the less extensive the leakage. However, not all leakage arises from a lack of linkages. Transfer abroad of factor income (Table 1, debit entries 4 and 5), and transfer of amortisation on foreign direct investment (Table 1, debit entry 6), result in a lower net foreign exchange effect irrespective of the extent of linkages.

Imports

The volume of imports, both direct and indirect, of the tourism sector depends on the extent to which demand for goods and services can be, and is, met within the domestic economy. In other words, it depends on the degree of diversification in the structure of production and the flexibility of domestic supply to respond to additional demand. The volume of inter-industry transactions is primarily a function of the level of development of the country, measured by the degree of structural transformation as indicated by Demas [1965, pp. 6-20]. Important elements of structural transformation are first the integration of formerly fragmented local markets into one national market, not just for consumer goods (the development of a homogeneous pattern of consumption), but also for raw materials and semi-manufactured goods (the development of forward and backward linkages), and, moreover, for factors of production, particularly labour (the disappearance of dualism, as emphasised by Myint [1970, pp. 315-347] and Dasgupta [1977, pp. 14-25]. A prerequisite for this internal market integration is a well-developed national transport- and communications network. A second important element of structural transformation is the capacity to react to price- and market changes, or what has been coined by Kindleberger "the capacity to transform". This implies among others the development of an economic mentality which is barely or not hampered by cultural traditions in other domains of life [cf Sombart, 1921; Tawney 1926/1954, p. 228]. In so-called traditional societies non-economic factors often interfere with economic ones and thus impede economic growth and development [cf Huntington, 1997; Landes, 1998].

Structural transformation of the economy is not guaranteed by or identical to having a relatively high per capita income. Some resource-rich, particularly oil-exporting, countries have attained a relatively high per capita income without much structural transformation. Since considerable differences in structural transformation exist between countries the relative volume of inter-industry transactions in tourism will show large variations.

Another factor which exerts an influence on the volume of inter-industry transactions is the size of the nation: "The economic structure of small nations is typically less diversified than that of larger units" [Kuznets, 1960, p. 15]. A small country may consequently expect an unfavourable ratio of gross and net receipts from international tourism. In a small country at a low level of structural transformation this unfavourable tendency is exacerbated by fragmented local markets and a sub-optimal capacity to react to market incentives. Apart from the degree of structural transformation of the economy and the size of the nation, the volume of imports of the tourism

sector is also related to the trade policies pursued by government. A relatively low import-content of tourism may be partly due to high customs duties on luxury consumer goods for which the country itself produces acceptable or even better alternatives. UNCTAD [1971, p. 27] points out that in the former Yugoslavia in the early 1970s the low volume of imports for tourism had to be attributed partly to restrictive import policies.

Transfer of Labour Income

The remittance abroad of labour income results from the employment of foreign managers and staff, and thus depends on the availability of adequately qualified personnel in the host country. It is well-known that the majority of manpower required in tourism (some 75 per cent) is within the category of semi-skilled or below [cf Erbes, 1973, pp. 20-21; Choy and Gee, 1978, p. 110], which in most developing countries is abundant. There are, however, notable exceptions to the rule that foreign employees are to be found only in the higher echelons of tourism enterprises. In St Maarten/ St Martin, a small island in the Caribbean, which is half Dutch Antillean and half French, for instance, the population on the Dutch side grew from an estimated 2,300 in 1950 to over 30,000 in 2001. In this period, due to demand for labour in the tourism sector, an enormous inward migration took place. As a result of this about half of the present-day population has a foreign nationality and many of the inhabitants constituting the other half became Dutch by naturalisation [Tourism & Transport Consult International (TTC) and AIDEnvironment, 2004, pp. 67-69]. The number of expatriates working in tourism depends, leaving aside illegal immigrants, on the labour admittance policy of the destination country, its system of professional education, and the possibilities for study abroad. No country will probably ever succeed in reaching a zero level of expatriates in its tourism sector, as among international hotel chains and hotel management companies it is good practice to man at least the top management positions with their own employees at the basis of rotation.

Transfer of Capital Income and Amortisation

The remittance abroad of capital income and amortisation is a function of foreign direct investment, including investment by foreign (holding) companies of residents. Foreign direct investment is stimulated by the tendency towards vertical integration in tourism [cf Young, 1973, pp. 97-106; Gómez and Sinclair, 1991, pp. 67-90]. Vertical integration in tourism (travel agent

– tour operator – airline – hotel) enables the adjustment of capacity in the subsequent stages of the production process and a reinforcement of the market position of each of the product components. This may have as a positive effect a high and stable occupancy rate of tourism facilities in the destination country. The reverse to the medal is that the ownership of crucial facilities is in the hands of foreign operators, with the concomitant risk of foreign domination. Vertically integrated multinational corporations, moreover, have the possibility of tax evasion by using imaginary transfer-prices for inter-company sales. This implies that the statement that "by securing finance, management, transport and marketing in one consortium the host country will stand the best chance of maximising its inflow of tourists and its earnings of foreign currency" [Skinner, 1969, p 15] is fallacious. Because of fictitious transfer-prices and the possibility to create profits or losses at will in one or another country, the destination country, depending on its fiscal climate, may gain or lose foreign exchange by an enlarged or diminished tax base.

Further, the amount of foreign exchange earned by a destination country depends partly on fiscal and financial incentives for investment in the tourism industry. "Too often tax holidays merely result in the prosperous firms earning a temporary benefit, while the rickety ones, which would not in any case have realised taxable profits, gain little advantage" [Meier, 1970, p. 207]. A Foreign Investment Advisor Service study [FIAS, 1997, cited in Dixon et al, 2001, pp. 24-25] observes that "tax holidays are not effective incentives under most conditions. Companies choose investment locations for sound business reasons, (..), and they will only be influenced by tax holidays when all else is equal". Much more effective will be the establishment of an investment climate that is conducive to private business initiatives [cf Theuns, 1998]. If governments, under the pressure of international competition, nevertheless feel compelled to offer financial incentives to foreign direct investment, they should be aware that as a consequence the outflow of profits may increase at the cost of government revenue.

A Structural Approach to the Extent of Leakages and Linkages in the Caribbean

The economic impact of tourism in the Caribbean depends above all on the volume of gross receipts. Linkages in, and leakage from, the national economy subsequently determine the extent of the divergence between the gross foreign exchange effect and the net foreign exchange effect or total primary national income effect. Attention will be focussed now on factors having a bearing on the extent of this divergence. The proportion of

the gross economic impact which is retained as a net contribution to GNP depends basically on the extent of the domestic market and the degree to which the potential of the market has been exploited through structural transformation of the economy.

Size of Nations

With few exceptions, such as Cuba, the Dominican Republic, and Haiti, all countries in the Caribbean are confronted by a size of their potential domestic market, which is severely limited. A first step to obtain an indication of the degree to which leakage will unavoidably occur, therefore, consists of classifying countries according to their potential market size. This potential size is primarily determined by the size of the population. Other factors that have a bearing on it are the size and geographical characteristics of the surface area, the population density, and, in connection with this, the geographical distribution of the population. Table 2 ranks 28 Caribbean countries/ territories according to size, using the 1998 population size as a yardstick. The figures on density show the population per square kilometre of surface area and are thus "not to be considered either as reflecting density in the urban sense or as indicating the supporting power of a territory's land and resources" [UN, 2001]. A low density, however, may indicate a transport and communication constraint which hampers unifying fragmented local markets into one national market. Small countries in terms of population size may either also be small (e.g. Bermuda) or large (e.g. Suriname) in terms of geographical area.

In terms of population the overwhelming majority of Caribbean countries is small if not tiny. Smallness is of course a relative concept. The population of Guyana is more than a hundred times larger than that of Anguilla, yet Guyana's population is small compared to that of the Dominican Republic which has an almost ten times larger population. Although needed for classification purposes, drawing distinct dividing lines is arbitrary. If a population of less than 1 million is considered small, 1 million or more but less than 5 million medium size, and 5 million and upwards large, 22 out of 28 countries / territories listed in table 2, or almost 80 per cent, are small, 3 medium size (Trinidad and Tobago, Jamaica and Puerto Rico) and 3 large size (Haiti, Dominican Republic and Cuba). Smallness in terms of population is thus an overriding characteristic of countries in the Caribbean.

A similar conclusion follows from measurement by area size. If an area of less than 20,000 square kilometres is considered small, between 20,000 and 100,000 medium size, and 100,000 or more large size, 22 countries, or

again almost 80 per cent, of the Caribbean countries are small, 3 countries (the Dominican Republic, Haiti and Belize) are medium size, and 3 countries (Suriname, Guyana and Cuba) large size.

A large surface area has certain advantages, a small area certain disadvantages. Apart from the limited land available for agriculture a small area also limits the chances of having a variety of natural resources, such as mineral deposits. The development potential of countries with a small population as well as a small surface area is severely constrained. They are not only confronted by the small size of their domestic market, but often also have only a limited range, as well as supply, of natural resources. "In the exploitation of natural resources, small countries tend to be typically less diversified" [Ward, 1975, p. 119]. A narrow resource base hinders the development of external markets and thus endangers the economic viability of small countries.

Table 2. Population, surface area, and population density in the Caribbean, 1998

Country/ Territory	Population (thousands)[1]	Surface area (km²)	Population density
Anguilla	8	96	84
Montserrat	11	102	105
Turks and Caicos Islands	16	430	36
Br. Virgin Islands	20	151	134
Cayman Islands	36	264	135
St. Kitts and Nevis	39	261	150
Bermuda	64	53	1,199
Antigua and Barbuda	67	442	151
Dominica	76	751	101
Aruba	92	193	477
Grenada	93	344	271
US Virgin Islands[2]	94	347	272
St Vincent and the Grenadines	111	388	286
St. Lucia	152	622	244
Netherlands Antilles	213	800	266
Belize	238	22,696	11
Barbados	268	430	624
Bahamas	298	13,878	21
Martinique	389	1,102	353
Suriname	414	163,265	3
Guadeloupe	443	1,705	260
Guyana	850	214,969	4
Trinidad and Tobago	1,283	5,130	250
Jamaica	2,538	10,990	231
Puerto Rico[2]	3,860	8,875	435
Haiti	7,647	27,750	276
Dominican Republic.	8,105	48,511	167
Cuba	11,116	110,861	100

Notes: 1) Mid-year estimates; 2) Including armed forces stationed in the area.

Source: UN, 2001.

Fortunately, small countries in the Caribbean are gifted with geographical features that support the development of tourism. Tourism then provides an escape from the limitations given by the small size of their domestic markets, sometimes, as expressed by Holder [1980, pp. 76-83], in futile anticipation of better times. If tourism provides the only possibility to escape from a subsistence economy the result will be a lop-sided and vulnerable economy with a huge degree of dependence on foreign markets. Development, defined as structural transformation of the economy, will be largely impossible. Growth in income instead is to be seen as pseudo-development. The plight of the small Caribbean countries is that they have to yield to being "exploited" by foreign interests by a sheer lack of alternative ways to earn a living above bare subsistence.

Level of Structural Transformation

Most of the small countries in the Caribbean have been quite successful in escaping from the subsistence economy through the development of external markets. Among the countries that are small both in terms of population and surface area, only one (St. Vincent and the Grenadines) has not yet succeeded in developing external markets to such degree that the per capita income is within the World Bank's upper middle income range (US$ 2,996-9,265). Since all other Caribbean countries that are small in terms of population as well as surface area have reached per capita income levels either within the World Bank's upper middle income range (Barbados, Dominica, Grenada, Montserrat, St. Kitts and Nevis, and St. Lucia) or within the high income range of US$ 9,266 or more (Anguilla, Antigua and Barbuda, Bahamas, Bermuda, British Virgin Islands, Cayman Islands, Guadeloupe, Martinique, Netherlands Antilles, and US Virgin Islands) it may be safely assumed that their internal transportation and communication networks are reasonably adequate and do not seriously hamper further growth in per capita income. As to St. Vincent and the Grenadines and the remaining Caribbean countries with either a medium size population (Trinidad and Tobago, Jamaica and Puerto Rico), or a large population (Haiti, the Dominican Republic and Cuba), as well as countries that are small in terms of population but medium size or large in terms of land area (Belize, Guyana and Suriname), the adequacy of the internal transport and communication network needs to be analysed. Indicators for internal transport and communication in these countries are provided in Tables 3 and 4 respectively. Using again a threefold ranking in low, medium and high level of development and awarding equal weights to each indicator a single yardstick for the adequacy

of internal transport and communication can be developed. The results of this exercise are presented in Table 5, together with the GDP per capita, an indication of the openness of the respective economies, and an indication of the relative importance of tourism as a source of foreign exchange.

Eight out of ten countries listed have a poorly developed internal transport and communications network hampering the structural transformation of their economies; two countries (Puerto Rico and Trinidad and Tobago) have a medium developed network. The latter belong respectively to the group of high income countries and upper middle income countries, whereas the former all belong to the group of lower middle income countries, except Haiti which is a low income country. It may be concluded that the economic development of the countries that score low in internal transport and communications is effectively hampered by their inadequate possibilities for integrating their fragmented local markets into one national market. Their presently low level of structural transformation implies that the existing level of linkages within their economy is low, and thus the existing level of leakage from their economies high.

Table 3. Road transport infrastructure and motor vehicles in Caribbean countries, 1996-1997

| Country/Territory | Road network in kms | | Paved road kms per km² | Motor vehicles | |
	Paved (main roads)	Unpaved (secondary roads)		Motor vehicles per 1000 inhabitants	Year of motor vehicle count
Belize	1,419	651	0.1	10	1998
Cuba	4,353	56,505	< 0.1	NA	–
Dominican Republic	6,225	6,375	0.1	71	1997
Guyana	7,970 [1]		NA	15	1997
Haiti	1.011	3,149	< 0.1	20	1999
Jamaica	13,433	5,567	1.2	84	1997
Puerto Rico	14,400	–	1.6	585	1998
St. Vincent and the Grenadines	319	721	0.8	109	1998
Suriname	1,178	3,352	< 0.1	185	1998
Trinidad and Tobago	7,900 [1]		NA	206	1998

Note: 1) includes unpaved roads.

Sources: Europa Publications, 2000; UN, 2001.

The figures on GDP per capita and total exports as percentage of GDP indicate that all countries, except Haiti, depend quite heavily on international trade. The composition of this trade, however, is quite different among countries. In St. Vincent and the Grenadines 44 % of total export

proceeds consists of gross receipts from tourism, a figure that is somewhat lower than in the more established small island tourism destinations in the Caribbean (e.g. Barbados 53%, Antigua and Barbuda 61%). If, however, the shares of gross receipts from tourism in the export of services are

Table 4. Communication media in selected Caribbean countries, 1996-1998

Country/ Territory	Main telephone lines per 100 inhabitants, 1998	Radios per 1,000 inhabitants, 1997	TV sets per 1,000 inhabitants, 1997	Circulation of newspapers per 1,000 inhabitants, 1996	
				Daily	Non-daily
Belize	14	591	183	–	363
Cuba	4	352	239	118	41
Dominican Republic	9	178	95	52	NA
Guyana	7	498	55	50	NA
Haiti	1	53	5	3	NA
Jamaica	19	483	183	63	NA
Puerto Rico	33	741	270	127	NA
St. Vincent and the Grenadines	19	690	163	9	302
Suriname	17	728	153	122	107
Trinidad and Tobago	21	533	333	123	118

Sources: UN (2001); UNESCO (1999).

Table 5. Transport and communication, economic performance, exports and tourism receipts in selected Caribbean countries, 1998

Country/ Territory	Transport & communication level	World Bank income group	GDP per capita in US $, current prices	Total exports as % of GDP	Gross tourism receipts as % of total exports
Belize	low	LMC	2,741	61	32
Cuba	low	LMC	2,150	NA	NA
Dominican Republic	low	LMC	1,925	57	32
Guyana	low	LMC	846	87	5
Haiti	low	LIC	443	14	24
Jamaica	low	LMC	2,707	52	37
Puerto Rico	medium	HIC	14,488	NA	NA
St. Vincent and the Grenadines	low	LMC	2,815	47	44
Suriname	low	LMC	2,454	48	3
Trinidad and Tobago	medium	UMC	4,632	50	7

Note: Low Income Country (LIC), GNI per capita in 2000 $ 755 or less; Lower Middle Income Country (LMC), $ 756-2,995; Upper Middle Income Country (UMC), $ 2,996-9,295, and High Income Country (HIC), $ 9,266 or more.

Sources: Tables 4 and 5 – UN, 2001; IMF, 2001; World Bank, 2001.

compared, the three countries score within the same range, as can be seen in Table 6, which ranks countries according to the share of gross receipts in total exports.

In 8 out of 18 countries listed in Table 6 gross tourism receipts constitute over 50 per cent of the total export value of goods and services. This regards countries that are all small both in terms of population and surface area. In 7 other countries gross tourism receipts make up between 20 and 50 per cent of the total export value. The three countries with a relatively small contribution of tourism to export proceeds (Guyana, Suriname, and Trinidad and Tobago) are all three mineral exporters.

The dominant position of tourism within exports of Caribbean countries arises from the fact that the majority of countries progressed from subsistence agriculture and plantation economies to service economies, passing over the manufacturing stage. With few exceptions, such as Cuba, the

Table 6. The relative weight of tourism as an export activity in selected Caribbean countries, various years

Country/ territory	Year	Total exports			Gross tourism receipts		
		Goods in million US $	Services in million US $	Services as % of total exports	Million US $	% of total exports	% of invisible exports
Anguilla	1994	1.64	61.56	97	56.30	89	91
Bahamas	2000	549.8	2,022.6	79	1,814.0	71	90
Montserrat	1994	2.92	27.15	90	20.07	67	74
St. Lucia	1996	86.31	269.64	76	236.58	66	88
St. Kitts and Nevis	1994	29.29	91.67	76	76.86	64	84
Antigua and Barbuda	1996	54.04	367.51	87	257.01	61	70
	1996	24.93	106.69	81	78.74	60	74
Grenada	1999	262.0	1,025.4	80	686.8	53	67
Barbados	1996	52.33	94.23	64	64.03	44	68
St. Vincent and the Grenadines	2000	1,554.6	2,025.8	57	1,332.6	37	66
Jamaica	2000	5,736.7	3,227.6	36	2,860.2	32	89
Dominican Republic	2000	212.3	172.4	45	122.0	32	71
Belize	1998	62.25	75.94	55	38.21	28	50
Dominica	1995	354.2	1,686.8	83	561.1	27	33
Netherlands Antilles	1998	299.3	180.0	38	113.2	24	63
Haiti	1998	2,258.0	671.7	23	200.6	7	30
Trinidad and Tobago	1995	495.7	133.5	21	32.6	5	24
Guyana	2000	399.1	90.9	19	15.8	3	17
Suriname							

Source: IMF, 2001.

Table 7. Value added in selected Caribbean countries, by economic activity, at current prices, percentages (activities as indicated at the bottom of the table)

Country/Territory	Year	1	2	3	4	5	6	7	8
Anguilla	1995	3.5	0.7	0.7	3.5	12.7	38.9	12.7	27.2
Antigua and Barbuda	1988	4.1	2.2	3.1	4.0	12.7	23.7	14.3	35.9
Aruba	1994	0.6[1]	–	5.8	3.5	7.0	28.6	9.2	45.4
Barbados	1995	6.4	0.6	6.8	3.4	4.7	31.8	9.2	37.1
Belize	1993	17.6	0.8	12.8	3.4	8.1	17.0	12.3	27.9
Br. Virgin Islands	1989	3.4	0.2	3.0	3.7	6.7	27.9	15.0	40.1
Cayman Islands	1991	0.3	0.3	1.5	3.1	9.1	22.8	10.7	52.1[2]
Cuba	1991	11.2	0.7	25.9	2.9	6.2	18.6	6.4	28.1
Dominica	1991	23.8	0.9	6.4	3.0	6.8	12.3	15.2	31.6
Dominican Republic	1993	17.5	3.0	14.1[3]	0.5	8.2	14.1[4]	6.9	35.8
Grenada	1991	14.9	0.4	5.3	3.1	10.4	19.5	14.3	32.1
Guadeloupe	1992	6.7	6.9[5]	–	1.7	6.5	16.2	7.9	54.1
Guyana	1999	35.4[6]	15.6	10.0[7]	–	5.4	4.6	6.7	22.2
Jamaica	1993	7.9	6.8	17.4	2.2	12.1	22.3	7.5	23.8
Martinique	1992	5.1	8.1[5]	–	2.2	5.2	18.4	6.5	54.5
Montserrat	1987	4.1	1.3	5.7	3.2	11.5	22.1	11.1	41.0
Netherlands Antilles	1994	0.8	–	6.3	2.8	5.7	24.1	13.8	46.4
St. Kitts and Nevis	1996	5.2	0.3	9.9	1.5	11.1	21.8	7.0	43.0
St. Lucia	1983	12.3	0.6	8.8	3.3	5.7	22.0	10.9	36.4
St. Vincent and the Grenadines	1997	9.7	0.3	7.5	5.1	11.4	16.5	20.3	29.2
Suriname	1996	14.3	8.9	10.9	7.5	2.5	24.8	11.2	24.0

Economic activities:
1. Agriculture, hunting, forestry and fishing.
2. Mining and quarrying.
3. Manufacturing.
4. Electricity, gas and water.
5. Construction.
6. Wholesale/ retail trade, restaurants and hotels.
7. Transport, storage and communication.
8. Other activities.

Notes:
1) Including mining and quarrying.
2) Excluding banks and insurance companies registered in Cayman Islands but with no physical presence in the Islands.
3) Including handiworks and repair services.
4) Restaurants and hotels are included in "other activities".
5) Including manufacturing.
6) Excluding hunting.
7) Including electricity, gas and water.

Source: UN, 2001.

Dominican Republic and Jamaica (data on Haiti, Puerto Rico and Trinidad and Tobago are not available) and to a lesser extent Belize the relative contribution of manufacturing to gross domestic product is small, as is shown

in Table 7. The exceptions are to be found in the group of countries with a medium size to large population, or having an ample supply of natural resources that can be used as inputs for manufacturing. Only in these countries can the basic discrepancy be overcome between on the supply-side, a plant size dictated by the technically most efficient scale of operations and, on the demand-side a plant size determined by the optimum size of the principally domestic market. For countries with a small population but a favourable resource base finding international outlets is crucial to success in manufacturing.

Ward's observation that "as a result of the limitations of the domestic market, the rate of growth of the economy (GDP) tends to be primarily a function of the rate of growth of exports of goods and services" [Ward, 1975, p. 125], applies particularly to those countries in the Caribbean that are small in terms of population and area, or in terms of population only. Since compared to manufacturing, services are less subject to economies of scale, for small countries development of service industries, such as tourism, off-shore banking, call centres, and ship registration, provides the most obvious solution to the problems arising from the smallness of the domestic market. This corresponds with Baker's view that "the engines of future growth are likely to be in the areas of tourism and other service industries" [Baker 1997]. Not by accident in 12 out of 18 countries listed in Table 6 total exports are dominated by services. This includes all countries that are small both in terms of population and area, irrespective of their GDP per capita.

Consequences for Leakages, Linkages and Income- and Employment Generation

Linkages in tourism take the form of demand by the tourism sector for inputs from other sectors, the supplying or intermediary sector, and are thus to be classified as backward linkages. Tourism has the potential for backward linkages development with many other activities in the economy. The actual level of linkage development depends amongst others on the presence/absence of a variety of other activities within the domestic economy, such as agriculture, horticulture, fishing, manufacturing and construction.

The largest medium term potential for the further development of linkages in the economy as a whole exists in descending order in (1) the two large lower middle income countries (Cuba and the Dominican Republic), (2) the medium size lower middle income country Jamaica and the medium

size upper middle income Trinidad and Tobago, and (3) the three countries that are small in terms of population but medium size or large in terms of area (Belize, Guyana and Suriname). The unrealised potential for the further development of linkages in those Caribbean countries that are small both in terms of population and surface area are severely limited, if not non-existent. The above classification is summarised in Table 8. It shows that as to size population takes precedence over area. An element not to be overlooked is the possibility to escape the vicious circles of poverty and stagnation. Haiti has a large unrealised potential, but the medium term possibilities are very limited due to its low level of general development, weak infrastructure and cultural and political constraints.

Table 8. Classification of countries according to the medium term potential for the further development of linkages: descending order I to IV

Type [1]	Population	Area	World Bank income group
I [2]	large	medium to large	LMC
II	medium	small	LMC – UMC
III	small	medium to large	LMC
IV [3]	small	small	UMC – HIC

Notes: [1] Type I: Cuba and the Dominican Republic.
      Type II: Jamaica and Trinidad and Tobago.
      Type III: Belize, Suriname and Guyana.
      Type IV: Anguilla, Antigua and Barbuda, Bahamas, Barbados, Bermuda, British Virgin Islands, Cayman Islands, Dominica, Grenada, Guadeloupe, Martinique, Montserrat, Netherlands Antilles, St. Kitts and Nevis, St. Lucia, St. Vincent and the Grenadines and US Virgin Islands.
  [2] Excludes LIC Haiti.
  [3] Includes LMC St.Vincent and the Grenadines.

The high percentage of gross tourism receipts in total export proceeds in Caribbean countries, that are small both in terms of population and area, some of which have attained a high per capita income, shows that tourism can be an effective vehicle for attaining substantial growth in income, even if a considerable part of the gross receipts leaks away. At the same time in these countries possibilities for further development of linkages are severely limited notwithstanding their presently existing low level. The gains from international tourism can in these circumstances be effectively increased only by increasing the gross receipts. This group of countries comprises Anguilla, Antigua and Barbuda, Aruba, Bahamas, Barbados, Bermuda, British Virgin Islands, Cayman Islands, Grenada,

Guadeloupe, Martinique, Montserrat, Netherlands Antilles, St. Kitts and Nevis, St. Lucia, St. Vincent and the Grenadines, Turks and Caicos Islands, and the US Virgin Islands.

Among the Caribbean countries that are small both in terms of population and area, as to this one notable exception exists, namely Dominica. In Dominica there is scope for increasing linkages, not directly arising from further structural transformation of the economy but from developing the eco-tourism market. Due to a different pattern of expenditure gross receipts from eco-tourism may produce more linkages. At the same time a longer average stay may, despite lower average daily expenditures, result in comparable gross receipts per tourist. Consequently the net receipts per tourist may be higher than in conventional Caribbean tourism. Differential economic impact analysis should prove whether and to what degree this is indeed the case. St. Lucia is also trying to tap the eco-tourism market through its Heritage Tourism Programme. This, however, as an addition to its main appeal as a see-sun-sand destination, which means that additional gross receipts will be generated which may produce also more linkages with other sectors in its economy, thus also increasing the general level of linkages.

Apart from these two, some of the remaining Caribbean countries, such as Belize, Suriname and Guyana, also specifically aim at developing eco-tourism. Those that actually succeed in developing this market may realise additional linkages, apart from those that arise from further structural transformation of their economies. The latter are the concomitant result of a general process of development and are not to be influenced directly by tourism policy makers. Some influence may be exerted, however, by national economic planning and constituent sector plans. To avoid bottlenecks and "to ensure consistency in policy and investment recommendations from one sector to another" inter-sector linkages should be analysed and taken into account [Baum and Tolbert, 1985, p. 74].

This way of linkage development depends heavily on a generally slow process of national economic development. There is thus little reason for making a big fuss about short-term linkage development. Those linkages that may be created in the short run tend to be less substantial and rather specific. Indications can be given only after a detailed in-depth country by country analysis of the operation of the tourism sector. They may have to do with market-information and -transparency, and marketing and distribution arrangements. In promoting linkages it is useful to make a distinction between the substantive, policy, and institutional levels [cf Charles and Marshall, 1991, pp. 36-59]. The substantive level has to do with the inherent possibilities for linkage development. The policy and institutional levels refer to the presence/absence of policies and institutions conducive to

realising linkages. Market-information and -transparency, and marketing and distribution arrangements may be improved by establishing effective institutions and devising and pursuing proper policies.

Increased linkages means less leakage, but also outside the domain of linkages a reduction of leakage may be realised. A possibility to reduce leakage may, for instance, arise from the economic benefits of environmental concern. Combined environmental and economic benefits may justify the temporary provision of subsidies for the application of environmentally friendly less import requiring technologies, such as solar energy.

Waiting for structural transformation to take place provides little comfort to countries that have little chance of attaining it or that are anxious to provide income and employment in the not too distant future. The time-honoured method to increase the net earnings from tourism and the net employment effect in the short to medium term then is to try to increase the gross earnings. This may imply (1) attracting more tourists in a given period, (2) having the same number of tourists, but with a longer average stay, or/and (3) attracting a different type of tourist. The first option may have the advantage of accomplishing a reduction in seasonal variation in arrivals and more even year-round occupancy rates, resulting in an increased return on capital invested. The second option to be effective will also have to result in an extension of the high and/or shoulder seasons depending on the spare capacity available in these seasons. The positive effect on year-round occupancy rates is similar. If the result is obtained without price differentiation (off-season discounts) the positive effect on the rate of return may even be better. For the third option to be effective policy-makers have to be well informed on the relative merits of different types of tourism/tourists. In the Caribbean the relevant (main and sub) types are low budget explorer, sub-type eco-tourist; organised mass tourist, sub-type all-inclusive resort tourist; foreign independent traveller, sub-type yachting and bare boat charter tourist; timeshare tourist; second home owner and permanent tourist; and same-day visitor, sub-type cruise visitor.

At present among Caribbean destinations obviously considerable differences already exist in tourism appeal. For instance, to generate gross revenue of US$ 201.1 million Curaçao in 2000 needed 191,200 tourist arrivals, whereas the Turks and Caicos Islands in the same year succeeded in generating a gross revenue of US$ 284.5 million from only 151,400 tourists. The higher amount of gross earnings from a lower volume of tourists in the Turks and Caicos Islands resulted from higher average daily expenditures, which amounted to US$ 250.5 compared to US$ 128.9 in Curaçao. The Turks and Caicos attained the higher amount of gross earnings despite having a lower average length of stay of 7.5 days compared to 8.2 days

in Curaçao. The foregoing exemplifies that small Caribbean countries that have a low level of linkages and little or no possibility to further diminish leakage are best served by upmarket high spending tourists.

The differences in average daily expenditures indicate a difference in the profile of tourists (type of tourist, country of origin, distance travelled). The profile of tourists emerges from visitor surveys. Comparison of these profiles could provide clues as to effective ways to increase both the gross (and net) receipts and the gross (and net) employment effect from tourism. Further, gross receipts may be increased by abolishing unnecessary financial and fiscal investment incentives and introducing and/or increasing special fees and taxes in order to capture resource rents [cf Dixon et al, 2001, pp. 25-26].

Finally, a larger part of the gross proceeds of the charter market might be captured if a Caribbean tour operator could be successfully established to take over (part of the) business from foreign operators, as well as provide a supplementary offer and create a heightened awareness of Caribbean destinations in origin markets. The 1984 feasibility study of a Caribbean tour operator for the European market, commissioned by the Caribbean Tourism Research and Development Centre and financed by the Commission of the European Communities (Stokes Kennedy Crowley 1984), however, has had no follow-up. In view of the hard-sell methods applied in recent years, consisting of subsidising European tour operators, with EU financial support, for inserting Caribbean pages in their brochures, it may be worthwhile to re-evaluate the issue. Due to increased possibilities of bookings through the internet since 1984 prospects may have improved. Smith and Jenner 1998, pp.74-75 note that in 1997 already fourteen Caribbean destinations were listed with one or more country sites on the Yahoo directory. Since then the online travel market has expanded considerably, with such sites as Expedia, lastminute.com and eBookers. In 2002 online travel turnover in Europe amounted to more than 7 billion euros already [Van Tartwijk, 2003]. A further indication of the size and importance of the online market is given by the Centre for the Promotion of Imports from developing countries [CBI, 2007] which notes that in 2005 more than 40 per cent of the travel bookings by the Dutch were done by way of the internet.

Policy Implications and Research Issues

Most Caribbean countries are small both in terms of population and surface area. These countries have little possibility to substantially increase linkages. As a consequence in order to increase their net benefits from tourism they have to concentrate efforts on boosting tourism growth in general.

Due to the structure of their economies a focus on types of tourism that have a low import-content runs the risk of being counterproductive. Indications are that upmarket high spending tourists are the best option. A minor still existing potential for increased linkages may be captured by improving market transparency and marketing and distribution arrangements. To detect specific possibilities in-depth country by country studies are needed.

The introduction of environmentally friendly and at the same time less import requiring technologies may provide an additional opportunity. The combination may warrant government subsidy. A further reduction of leakage may result from a reduction, where possible, in the number of expatriate staff, devising and implementing effective negotiation processes as to management fees, stimulating re-investment of depreciation and profits, and screening financial and fiscal incentives with a view to abolishing redundant parts of it. Net earnings of foreign exchange may be increased also by introducing or increasing special fees and taxes to capture resource rents.

Finally, since there is nothing wrong with a fair degree of competition, it is worthwhile to revive the issue of establishing a Caribbean tour operator. If feasible a Caribbean tour operator could manage to catch a larger part of gross proceeds of the charter market. Countries with a large or medium size population have a larger array of alternatives to increase income and employment from tourism. Apart from improvement in their income and employment situation arising from indiscriminately boosting tourism growth they may profit from substantial gains in linkages, arising from the further structural transformation of their economies. Taking care of an investment climate conducive to private enterprise may be their best bet to attain further economic development in general as well as tourism development. Compared with countries having a small population their choice of types of tourism is less constrained. Upmarket tourism may be fine, but eco-tourism and other types of tourism may offer attractive perspectives as well. This also applies, though probably to a lesser degree, to those countries that are small in terms of population, but large, or at least substantially above average size, as to area.

A decision on types of tourism to be developed should be based on their relative merits as to income and employment generation, and should hence be based on differential economic impact analysis. Further points to be taken into account are the potential of the markets to be tapped and the availability of investment funds. Some forthcoming investment money will be earmarked and can thus not be allocated according to preference arising from impact analysis.

The analysis of tourism development possibilities and devising appropriate policies in the Caribbean is hampered by a dearth of data that are both reliable and up to date.

A consistent minimum set of statistics should cover three distinct fields [cf WTO, 1995a]:

(1) the flow of tourists, its constituent elements and inherent characteristics (the demand side);

(2) tourist accommodation (apart from natural and cultural amenities the most important single element of supply); and

(3) tourism receipts / expenditures resulting from the match between supply and demand.

Data on (1) and (2) are to be collected on a continuous basis respectively through frontier checks and monthly reporting by the accommodation sub-sector. As far as possible these data should be arranged in such a way as to provide useful information as to types of tourism/tourists. The main source of information on tourism receipts / expenditures are sample surveys [cf WTO, 1995b]. They provide valuable information on the visitor profile and are at the basis of differential economic impact assessment and should therefore be conducted on a regular periodic basis. A considered judgment on type of tourism should not necessarily aim at maximising GNP. The distribution of income, employment considerations and/or the development of local entrepreneurial abilities may deserve special attention. Not all types of tourism have the same distribution effects, are equally effective in employment creation, or provide the same leeway for the development of local SMEs.

To allow an insight into the structure of the economy national accounts are needed. These need to be compiled and published on a regular basis. To allow an insight into the structure of the tourism sector and its linkages with the national economy a tourism operating account and/ or tourism satellite account are needed.

Summary and Conclusions

Although smallness is an overriding characteristic of the countries in the Caribbean considerable differences and some notable exceptions exist. Taking into account size in terms of population, surface area and GDP per capita four distinct groups of countries can be distinguished:

(1) Countries that are small in terms of population as well as surface area and have per capita incomes within the high or upper middle income ranges. This applies to the majority of countries in the Caribbean (16 out of 26 countries for which information is available) and comprises all island countries that are small in terms of population as well as area, except one, namely St. Vincent and the Grenadines;

(2) Countries that are large in terms of population and medium size or large in terms of area and have per capita incomes within the lower middle income range: Cuba and the Dominican Republic;

(3) Countries that are small in terms of population, but large in terms of area and have per capita incomes within the lower middle income range: Guyana and Suriname;

(4) Countries that are medium size in terms of population, but small in terms of area and have per capita incomes within the lower middle or upper middle income ranges: Jamaica and Trinidad and Tobago.

The remaining countries for which information is available, Belize, Haiti, Puerto Rico and St Vincent and the Grenadines are hard to classify. Belize probably fits best into group 3, Puerto Rico in group 4. Since large discrepancies in per capita incomes exist between on the one hand St Vincent and the Grenadines and group 1 and on the other hand Haiti and group 2 these countries defy classification.

The classification of countries has a bearing on their medium term potential for further structural transformation of their economies and the development of linkages. The best possibilities in descending order exist in groups 2, 4, and 3 (including Belize). Due to its small size prospects for structural transformation and development of substantial linkages in St Vincent and the Grenadines are small, both in the medium and long term, whereas Haiti is still hindered by strong impediments to structural transformation of its economy and consequent growth in income and employment.

Countries belonging to group 1 have little chance of attaining further structural transformation of their economies. They should therefore focus on increasing gross receipts from tourism instead of creating additional linkages. Due to the low level of structural transformation in their economies leakage of gross receipts will tend to be high irrespective of the type of tourism. Their best option therefore may be to develop upmarket tourism characterised by high average daily expenditures.

There is probably scope for further reduction of leakage or an increase in the gross receipts captured by destination countries, irrespective of the group to which they belong. Possibilities may arise from abolishing superfluous financial and fiscal incentives, the introduction or raising of special fees and taxes to capture resource rents, the eventual establishment of a Caribbean tour operator, reduction of expatriate staff, reduction of management fees, increased re-investment, improvement of market transparency and marketing and distribution arrangements, and import saving environmentally friendly technologies.

Countries in groups 2, 3 and 4 have a wider choice than those in group 1. They may be in a position to realise considerable linkages in the me-

dium term, as well as, depending on their natural and cultural amenities, a considerable growth in gross receipts originating from various types of tourism.

To determine the relative merits of different types of tourism differential economic impact analyses are needed. Since the level of linkages differs according to the level of structural transformation in the economy results of such analyses should be treated with caution when comparing countries. Results should not be applied to countries with a substantially different degree of structural transformation.

There exists a dearth of data that are both reliable and up to date. This applies particularly to data on receipts/expenditures and the profile of visitors to be derived from visitor surveys, national accounts and tourism operating and satellite accounts.

Instead of wasting time, energy and money on the estimation of income and employment multipliers, research efforts should focus on the primary direct and indirect effects of tourism on GDP and GNP, and employment. Where possible these efforts should differentiate between different types of tourism, such as cruise-, hotel-, all-inclusive-, time share-, yachting-, and second home tourism.

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A Brief Outline of the Academic Achievements of H. Leo Theuns and His Contribution to the Development of Tourism Research

H. Leo Theuns graduated from Tilburg University with BA and MA degrees in Economics, in 1958 and 1962 respectively. He was awarded a PhD degree in Economics by the University of Amsterdam in 1989, presenting the thesis *Tourism in developing countries – impacts of and conditions for tourism in low-income countries*. The subject matter of the dissertation reflects the author's major tourism research interest, which is the effect of international tourism on economic growth and the conditions in developing countries. His second main research area includes development of tourism education and tourism research. Furthermore, his research has focused on assessing economic and developmental impacts of different types of tourists/tourism, the role of the public sector as an actor in the development of tourism, maximisation of economic benefits and reduction/mitigation of social and environmental costs, determinants of demand for recreational travel, and consequences of globalisation. Leo Theuns has written and edited 3 books, more than 50 articles, chapters in books, reviews and commentaries, and numerous reports and expert studies, mainly in English and Dutch, but also in French, Spanish, Italian and Polish.

Leo Theuns' career path has been marked by two complementary roles – as an economic professional and consultant, and as an academic researcher. He began his career in Suriname as a Deputy Economic Adviser at the National Planning Bureau in Paramaribo. After three years he moved to the Netherlands Antilles where he worked as an economist and became Head of the Division of Economic Affairs and Deputy Director for Economic Affairs in the Department of Social and Economic Affairs in Willemstad, Curaçao. He liaised and acted as a local counterpart for the first comprehensive study of the potential for tourism development in the Netherlands Antilles (1969) and got interested in the potential contribution of international tourism to economic growth and development.

When he came back to the Netherlands and joined Tilburg University as Lecturer in Development Economics in 1970, he pursued this interest in his academic research and helped pioneer development of tourism as a study subject in higher education and scientific research. He also worked as Visiting Professor at the Department of Economics of Northern Illinois University in DeKalb, USA (1974). In 1976-1978 Dr. Theuns managed for Tilburg University and the Netherlands Institute of Tourism and Transport Studies in Breda a joint project on the future development of research and teaching in Tourism, Recreation, and Leisure Studies in the

Netherlands, funded by the Dutch Ministry of Education and Science. The reports in the project, for which he acted as editor, covered, amongst other things, needs assessment, job profiles and curriculum development. In 1981 as a spin-off, in conjunction with Amina Rasheed of the Centro di Studi Turistici in Florence, Italy, he prepared a paper on tertiary tourism education with special reference to developing countries.

Due to the rise of meritocracy among academic researchers in the Netherlands in the second half of the 80s and the consequent development and application of yardsticks for the measurement of productivity and quality of output, he developed an interest in the competitive position of tourism research within and among established disciplines such as economics, sociology, geography, and psychology. This led to several published articles, e.g. *Media use in Third World tourism research.* Annals of Tourism Research 19(2), 1992: 343-347, and *Publishing strategy and SSCI citation impact, 1950-1984. Third World tourism research as an example.* Tourism Recreation Research 22(1), 1997: 61-70.

Since 1991, after acceptance of a part time position of Senior Research Fellow in Social Economics in Tilburg University, he has been extensively involved in short-term and long-term consulting projects. For ESCAP he reviewed the possibilities for sustainable tourism development in nine least developed countries in the Asia-Pacific region (1992), he was also an adviser on statistics and research in the Namibia Tourism Development Programme (1996-97). Also, for almost two years following 1993, Dr. Theuns co-created the basis of policy and organisational structure of tourism in Poland, under the auspices of the EU-PHARE Programme for Tourism Development. This activity was documented by several publications for the Foundation for Tourism Development and the Institute of Tourism, e.g. *The challenge of tourism product development in Poland, with special reference to Lower Silesia,* published in 1993 by the Institute of Tourism in Warsaw, and in Polish translation by the State Sport and Tourism Administration in its 1993 publication *Regionalny Produkt Turystyczny Dolny Slask i Ziemia Opolska.*

To facilitate access to existing literature for teaching as well as research he was engaged in preparing a number of bibliographic tools, partly in conjunction with Marlie Passier, a sociologist who had been affiliated with the institute in Breda (1982-83). In line with these activities to further research in tourism a survey was conducted among experts to review perceptions about research needs, particularly as to developing countries. The results of the survey were initially published in *Les Cahiers du Tourisme*, Série C, No. 96 by the Centre des Hautes Etudes Touristiques (CHET) in Aix-en-Provence in 1984, and reprinted in 1985 by the Centre for Tourism Research and Development in Lucknow (India) in its journal *Tourism Recreation Research* 10(1): 9-14 and 10(2): 45. One year later a Polish translation was published by the Instytut Turystyki in Warsaw in its journal *Problemy Turystyki* 9(1): 48-66.

He has successfully completed assignments for international organisations, such as the World Tourism Organisation, the United Nations Environment Programme, the United Nations Economic and Social Commission for Asia and the Pacific, the Commission of the European Union, the United Nations Development Programme, and the World Bank, as well as some (semi-)private organisations.

Leo Theuns is a member, or former member, of professional organisations, such as the International Academy for the Study of Tourism, TTRA, AIEST, the Advisory Board of the National Geographic Society's Sustainable Tourism Initiative, and the Advisory Board of the Centre for Tourism Research and Development in Lucknow (India). He is, or has been, on the Editorial Board of several journals, such as Acta Turistica (Zagreb), Tourism Recreation Research (Lucknow) and the Journal of Tourism (Srinagar).

In his consulting assignments he has been active in programme/project identification and preparation, including drawing up of Terms of Reference, project appraisals, project implementation and programme/project evaluation. He prepared a considerable number of tourism sector reviews, some of which resulted in academic publications (journal articles and contributions to anthologies), e.g. *The Maldives. An Example of Successful Tourism Development* (in Dutch) in: F. Boekema (ed.) *Sociale Economie. Markten, Instituties en Beleid.* Groningen, Wolters-Noordhoff, 1993, pp. 117-131. As a consultant he has applied academic knowledge to contemporary policy issues and advised on such issues as tourism product development, structure and tasks of the NTO, statistics, market research, investment incentives, carrying capacity, and increasing the economic benefits derived from tourism.

(profile prepared by Piotr Zmyślony)

CASE STUDY RESEARCH ON EVALUATIONS OF DESTINATION MANAGEMENT ORGANIZATIONS' ACTIONS AND OUTCOMES

Arch G. Woodside*
Marcia Y. Sakai**

Abstract: The present article includes a case study that describes and analyzes three performance audit reports over a three decade period for one U.S. state government's destination management organization's (DMO) actions and outcomes. This report extends prior studies [Woodside and Sakai 2001, 2003] that support two conclusions: (1) the available independent performance audits of DMOs' actions and outcomes indicate that frequently DMOs perform poorly and fail to meaningfully assess the impacts of their own actions and (2) the audits themselves are shallow and often fail to provide information on DMOs' actions and outcomes relating to these organizations largest marketing expenditures. The article calls for embracing a strategy shift in designing program evaluations by both by government departments responsible for managing destinations' tourism marketing programs and by all government auditing agencies in conducting future management performance audits. The article offers a "tourism performance audit template" as a tool for both strategic planning by destination management organizations and for evaluating DMOs' planning and implementing strategies.

Keywords: destination management organization, tourism marketing, audit, evaluation.

Introduction

"Natural sensemaking" refers to an individual's or organization's actually go about understanding the causes, processes, and outcomes of specific decisions and events [see Kahneman and Tversky, 2000; Neil, McKee and Rose, 2007; Thomas, Clark and Gioia, 1993; Weick, Sutcliffe and Obstfeld, 2005; Wilson, 2004]. The literature suggests that humans frequently are highly biased, overly confident that their views are accurate, naturally have weak sense making skills, overly simplify their observations, typically ig-

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nore and discount complexities, and are not particularly accurate in taking measurements [e.g., see Gilovich, 1991; Gigerenzer, 2000; Malle, 1999; Plous, 1993; Sackman, 1991; Wegner, 2002].

However, the evidence relating to weak sensemaking skills is not all negative. When humans do become aware of inadequate sense and decision making characteristics apply to them, in some circumstances they are adept in creating and applying tools to increase sense and decision making skills and to accurately evaluate outcomes [see Klein, Moon and Hoffman 2006; Weick, 1995]. For example, aircraft pilots complete complex activity checklists (i.e., template tools for sensemaking and decision making and for completing actions relating to such sense making) to cover all the complexity inherent in flying an aircraft. In other words pilots do not rely alone on thoughts retrieved for doing the complex relevant tasks necessary for safe aircraft liftoffs. One aim of this article is to suggest the creation and use of analysis formal templates for analyzing the planning and implementing actions of destination management organizations (DMOs) rather than reporting reliance on "generally accepted accounting practices" in reports on such management and marketing audits. This report describes what such templates likely need to include and how they are relevant to evaluating both the actions of the management auditors as well as DMOs.

However, the use of templates and other sensemaking tools does not come automatically for complex decision making. Humans are prone to ignore such aids unless required to use them. Actions that follow such ignoring often include bad to disastrous outcomes. In studying why decisions fail Nutt [1993, 2002] finds the management failure is four times more likely when decision makers embrace the first idea they come across without taking the time to investigate what is motivating action and possible remedies. The second blunder – misuse of resources – occurs when managers spend their time and money during decision making on the wrong things, he said. For example, decision makers may spend millions of dollars to defend a hastily selected idea with an evaluation and little or nothing on other aspects of decision making, such as gathering intelligence about the concerns prompting action, finding who may block action, setting expectations, and uncovering actions that can meet their expectations. Woodside and Sakai's [2003] review of seven DMO performance audits finds no substantive commentary in the intelligence gathering behavior done by DMOs and a marked proneness in these audits to focus on minor issues and to ignore assessing of the impact of major expenditures.

Without structural mandates (e.g., organizational or legal requirements), the creation and use of explicit sensemaking tools often does not occur for even complex and/or important decisions. When the combination

occurs of routine complex/important decisions and highly observable major disasters, humans tend to mandate the use of sensemaking tools prior to implementing major actions. Air travel decisions have this situational combination; sensemaking and decision making by DMO executives do not. Unfortunately, while the substantial value in using sensemaking and judgment tools is well-known in the organizational studies and decision making literatures, meta-evaluation reviews of performance audits of DMOs do not include evidence that DMO executives or auditors have knowledge about these tools or their value [Pike, 2007; Woodside and Sakai, 2001, 2003].

This article illustrates audit reports on sensemaking and decision making methods relating to widely adopted evaluations of destination tourism management actions and outcomes consistently indicate poor performance. "Inadequate" applies but does not capture the poor quality of most published reports about destination tourism management and marketing performance [for a review of all available audit reports see Woodside and Sakai, 2003]. The article goes beyond criticism alone to offer strategic and tactical management tools to serve as platforms for achieving effective tourism management performance audits and to improve planning (for a study on the value of planning see Armstrong 1982) and implementing skills of destination tourism management and marketing executives.

Following this introduction, section two provides a brief background on tourism management performance auditing by state governments. Section three describes an example of a recent tourism management performance audit in some detail-along with the key shortcomings of the audit and a major outcome that followed from the audit. Section four presents the state audit division's evaluations of two prior tourism management performance audits described in section three. In total this article evaluates three tourism management performance audits done by one audit government division for the State of Hawaii. Section five provides a brief review for approaches for understanding and crafting both effective tourism management strategies and performance audits of the planning, implementing, and measuring outcomes of such strategies.

A Brief Background on Tourism Management Performance Auditing

In 1969 New York established the first state auditing and evaluation unit. A total of 61 such government departments exist in the U.S. – at least one in each of the 50 state legislatures in the United States [Brooks, 1997]. State legislatures mandate that these auditing offices conduct financial audits and performance audits of government departments and their specific

programs. The state auditing offices are required to provide answers to questions, including the following issues:

- is the audited department spending funds legally and properly in accordance to its legislative mandate;
- is the department's accounting and internal control systems adequate,
- are the department's financial statements accurate;
- is the department managing its operations efficiently;
- is the department achieving substantial impact in effectively accomplishing its goals?

Thus, the auditing work done for state legislative branches include two major categories of audits: (a) financial audits and (b) performance audits. Some state audit manuals distinguish among program, operations, and management audits [e.g., The Auditor, 1994]. For example, "a *program audit* focuses on how effectively a set of activities achieves objectives. A program audit can stand-alone or be combined with an operations audit. An *operations audit* focuses on the efficiency and economy with which an agency conducts its operations. In Hawaii the term *management audit* is used often to refer to an audit that combines aspects of program and operations audit. A management audit examines the effectiveness of a program or the efficiency of an agency in implementing the program or both" [The Auditor, 1994, p. 1-2]. The present article uses "management audit" and "performance audit" interchangeably.

Evaluating the 2003 Hawaii "Management and Financial Audit of the Hawai`i Tourism Authority's Major Contracts"

This section reports the main findings with a critique of the 2003 tourism management performance audit report done by The Auditor, State of Hawaii [Report No. 03-10, June 2003, 61 pages]. The 2003 report is the most recent management performance audit for Hawaii's DMO actions and outcomes; note that such audits by governments are usually done once every five to ten years – or even less frequently. Thus, this case study includes analyses of findings for all three available reports related to the State's own evaluations of tourism marketing programs – the 1987, 1993, and 2003 "management and financial audits of the Hawai`i Tourism Authority."

Key background information for understanding the Hawaii 2003 audit includes the following points.

1　The "Hawai`i Tourism Authority (HTA)" is the leading government tourism agency for the State of Hawaii. The HTA reports directly to the governor and legislature and is attached to the Department of Business, Economic Development and Tourism (DBEDT) for administrative purposes.

2   The "Hawai`i Visitors and Convention Bureau (HVCB)" is a nonprofit corporation that receives contracts from the State of Hawaii for planning and implementing tourism marketing as well as the marketing for meetings, conventions, and incentives related visits to Hawaii. The HVCB was established in 1903 and in 2002 had offices in Honolulu, each of the major Hawaiian neighbor islands, Salinas (California), San Diego, Chicago, Arlington, Tokyo, Osaka, Beijing, and Shanghai.

3   "State contract funds account for about 95 percent of HVCB's cash [real money] funding" [Management and Financial Audit of the Hawai`i Tourism Authority's Major Contracts, 2003].

The State of Hawaii directs the Auditor to conduct a financial and management audit of the HTA's "major contractors." A major contractor is an organization awarded a contract in excess of $15 million. The State of Hawaii awarded multi-year contract with HVCB beginning January 1, 2000 and ending December 31, 2002 valued at $129 million for marketing leisure visits to the State and $22.7 million for marketing meetings, conventions, and incentives – totaling $151.7 million.

Key Findings in the 2003 Hawaii Management and Financial Audit Report on the HTA and HVCB

The following three paragraphs are the 2003 report's core findings. [The complete 2003 report is available at http://www.state.hi.us/auditor/Reports/2003/03-10.pdf.] The following comments are found in the report's Summary section.

• We found that inadequate oversight by the authority provided HVCB with a blank check to spend state funds for self-serving purposes. For example, we found that HVCB increased the compensation of its state-funded employees by 42 percent over the past three years – from $3.7 million in CY2000 to $5.3 million in CY2002 – although the amount of state funding for those same years remained relatively unchanged. The bureau also used state contract funds to pay for exorbitant bonuses and unnecessary severance packages for its employees who were already highly compensated. For example, eight employees were paid between $90,000 and $170,000 with state funds in CY2002. Although it was not obligated to do so, HVCB paid and accrued approximately $202,000 in severance pay using state contract funds. One employee's severance pay was approximately $141,000, nearly the equivalent of that employee's annual salary.

• The bureau also expended $191,000 in state contract funds for other inappropriate or questionable expenditures. Such expenditures included paying for an employee's parking and speeding tickets and reim-

bursing an employee for the employee's family travel expenses. These expenditures violate HVCB's own travel and entertainment policy. We also found an unusual arrangement whereby the state-funded salary of HVCB's vice president in Japan is supplemented by an airline. HVCB asserts that this arrangement does not give that airline an unfair advantage in negotiating favorable cooperative marketing partnerships. However, any arrangement that presents even the *appearance* of a conflict of interest should be avoided so that marketing activities supported by state contract funds are not tainted. Furthermore, we question the propriety of HVCB using its consultant law firm, paid with state funds, to perform legal services that sought to undermine the authority and the State.

- The bureau also exercised poor management and oversight over its state-funded contractors. For example, rather than formally evaluating its subcontractors, HVCB relied on personal relationships and oral communication to evaluate its state-funded subcontractors. We also found that HVCB awarded a $242,000 state-funded subcontract to a vice president's firm on the same day she resigned as HVCB vice president for developing international markets. In addition, the bureau did not execute contracts in a timely manner, procured services that were beyond the scope of its state contracts, and maintained contract files that were incomplete and disorganized. We also found questionable arrangements between the former governor's office and HVCB that raise questions about whether the former governor's office used HVCB to circumvent the State Procurement Code.

The 2003 report's upfront summary also includes the following statement. "We also found that the authority's (HTA) lax monitoring and enforcement of its contracts with HVCB left little assurance that $151.7 million in state funds are effectively spent. Specifically, we found that poorly constructed contracts and inadequate contact monitoring and enforcement by the authority did not adequately protect the State's interests. For example, the plethora of reports submitted by HVCB contained vague information that failed to tie results to goals and objectives."

Wrong Framing on Minor Issues

While the summary of the Hawaii 2003 management audit report focuses on important issues and points toward questionable expenditures by HVCB and poor oversight by HTA, the summary and report says little about the effectiveness of the largest share of the contract expenditures. The total

expenditures of $5.2 million plus severance payouts totally about $1 million, plus $191,000 in questionable expenditures and a $242,000 cronyism-tainted subcontract award, represent less than 5 percent of the total contract award of $151.7 million. The 2003 audit report fails to provide many details of the contract's specific allocation of the $145 million expenditures and the impact of these expenditures.

Statements contained inside the 2003 audit report provide a more telling but still incomplete and an inadequate assessment of the impact of most funds awarded to the HVCB. The following statements all appear on page 32 of the main report.

- The [HTA] authority also agreed to contracts that did not have clearly defined goals and objectives. As a result, the authority was unable to adequately assess whether the $151.7 million in state contract funds were effectively spent.
- The authority's two contracts with HVCB to provide leisure and meetings, conventions and incentives marketing services did not provide either measurable and quantifiable objectives or performance levels to hold HVCB accountable to. Instead, HVCB was basically required to draft annual tourism marketing plans outlining how it would conduct marketing related activities to attract leisure and business travelers to Hawai`i.
- Specifically, the leisure contract required that HVCB develop and implement a marketing plan to increase promotional presence and brand entity to more globally competitive levels; develop and execute cooperative programs with travel partners to optimize use of authority resources; and support TV and film initiatives that provide cost effective, high profile exposure. However, the authority did not provide measurable and quantifiable goals or benchmarks for HVCB to achieve for these three broad contract objectives.
- The meetings, conventions and incentives contract's objectives were equally broad. It required that HVCB create a marketing plan to increase revenues by attracting delegates and attendees; enhance Hawai`i's image as a leading business meeting, convention and incentive destination internationally; and create high profile exposure and marketing opportunities.
- However, the authority did not identify a specific percentage or dollar amount of the increase in revenues that HVCB's marketing activities should result in. The contract was also silent as to how HVCB would prove that it successfully enhanced Hawai`i's image as a business destination. For example, a possible performance benchmark for HVCB to achieve might have been a target percentage increase in the number of business travelers surveyed who had a better image of Hawai'i after attending a meeting or conference in Hawai`i.

- We also found the authority's monitoring philosophy over HVCB to be alarming. According to the authority, HVCB met its entire contractual obligations once it submitted and executed the marketing plans. Accountability for results rested with the authority – not HVCB. In addition, the authority used these plans, and not the actual contracts, to monitor HVCB's services. Moreover, the plans lacked the specificity needed to enable the authority to know exactly what services or benefits the State was receiving for the $151.7 million it provided to HVCB to market Hawai`i. In the end, the authority had no means to assess whether the $151.7 million had been effectively spent, nor could the authority determine whether the expenditures had resulted in enhanced leisure and business travel to Hawai`i.

The above paragraphs imply the need to address the central issues in management performance audits. Specifically, what metrics should the HTA, HVCB, and the State Auditor adopt for measuring impact performance for the activities and expenditures for the two programs? The report's introduction, method, and findings sections include no background research of the literature on program evaluation research [for a review of the literature on program evaluation see Woodside and Sakai, 2003].

The two core research questions relating to creating appropriate metrics for measuring management/marketing program impact include (1) estimating the extent to which the observed results might have occurred without the program execution [Campbell, 1969] and (2) measuring planning and implementing activities done by both the department managing the tourism marketing program and performing the management performance audit.

Kotler, Gregor and Rodgers [1977] stress that audit measurements of outcomes are insufficient; planning and implementing actions done and not done but should have been done need examination. The need to measure activities in planning and implementing builds on the proposition those only assessing outcomes are insufficient since execution in crafting plans and implementing activities affects outcomes. Luck also plays a role in performance outcomes in the short run – for any given year [cf Bonoma, 1985; Kotler et al, 1977].

Valid measures to answer the outcome question require the use of true or quasi-experimentation [see Campbell, 1969; Cook, 1997; Woodside, 1990]. True experiments require treatment and placebo (control) groups with random assignments of cases (e.g. informants) to groups. Quasi-experiments often include comparisons among non-equivalent groups over several time periods – before, during, and after introducing substantially different marketing creating work and/or expenditures. The literature on experimenta-

tion for measuring impact of management/marketing actions is well developed (Banks 1965 is the classic report in the literature) and explanations for applications for measuring the impact of tourism management programs are available in the literature [e.g. Woodside, 1990; Woodside, MacDonald and Trappey 1997; Woodside and Sakai, 2001, 2003].

The 2003 audit calls for creating and applying benchmarks is on target but the report lacks the necessary detail and fails to reference any relevant work in the program evaluation literature [e.g. the classic reports by Bellavita, Wholey and Abramson 1986; Brooks, 1997; Campbell 1969; Cronbach et al 1980; Patton, 1997; Pollitt and Summa, 1997; Sevin, 1965; Scriven, 1967, 1974, 1980, 1987, 1995; Shadish, Cook, and Levitton, 1991; Stake, 1980; Stake et al, 1997; Weiss, 1972, 1987; Wholey, 1977, 1997].

Figure 1 displays a summary hypothetical (thought experiment) example of quasi-experiment metrics (time on the X-axis and dependent metrics on the Y-axis) [see Campbell, 1969] for a State's marketing/advertising campaign implemented in some markets receiving exposure to the campaign and other markets not exposed to the campaign. Also this metric shows changes to competitors' market shares in both the exposed and non-exposed markets. Figure 1 shows a large increase in one or more key dependent variables during the time when advertising expenditures are heavy (or when

Note. Assume one-time heavy advertising weight (expenditure occur in 2009 in 5 specific markets) or a unique new message is used in these 5 markets at the same ad weight. The patterns in Figure 1 indicate that the heavy ad budget weight (3X) is effective in (1) increasing number of arrivals (or market share or tax dollars) in comparison to (2) regular ad budge (1X) expenditures by Hawaii and in comparison to the (3) drop in number of arrivals for the competitor in the 5 markets receiving high (3X) ad expenditures by Hawaii versus the (4) near constant levels of arrivals to the competitor's destination in the markets receiving normal (1X) ad weight to attract Hawaii visitors. Source: Original exhibit for this chapter; see Campbell (1969) for exhbits of additional quasi-experiments.

Figure 1. Longitudinal Quasi-Experiment to Measure Hawaii's Advertising Impact on Annual Number of Arrivals (or Market Share or Tax Dollars) by (from) Tourists

a new campaign message and literature are applied) in selected markets (note the shift in trend 1) but not in markets where advertising weight (or new message and literature) has been changed (trend 2 in Figure 1). Also, note the additional evidence of impact – the competitor's decline in performance across the same markets where Hawaii has increased its marketing activity by a factor of 3 (trend 3) with no decline for the competitor in the other markets (trend 4 – Figure 1 shows an increase for this condition).

Consider measuring leisure tourists' arrivals from Japan and Hong Kong to Hawaii and Australia for years 2000, 2001, 2002, and 2003 with the State of Hawaii spending 30 percent of its total advertising and marketing expenditures to attract arrivals from Japan in years 2002 and zero on attracting Japanese visitors in 2000 and 2001. Also, assume the State of Hawaii spends nothing on attracting visitors from Hong Kong during 2000-2003 and the marketing expenditures by Australia on attracting Hong Kong and Japanese visitors remain constant during 2000-2003. Evidence of Hawaii's promotional efforts having impact on tourism requires a pattern of annual changes that is systematic and favors growth (or fewer declines) for arrivals from Japan versus Hong Kong for Hawaii and a negative impact on share for Australia for the Japanese market more so than compared to the Hong Kong market.

The point is that only observing a dramatic increase in arrivals from Japan is insufficient to conclude that the marketing expenditures were the prime reason for the increase [cf Campbell, 1969]. The following visitor patterns occurring in the same year would question the effectiveness of Hawaii tourism efforts:

- a 30 percent increase in annual arrivals from an origin where Hawaii recently has spent a substantial proportion of its advertising budget while arrivals from other origins where Hawaii had not spent advertising funds to Hawaii also increase about 30 percent;
- a competitor of Hawaii's tourism marketing program witnesses a 40 percent increase in arrivals from origins where Hawaii spent a substantial proportion of its advertising budget and a similar increase in arrivals from origins where Hawaii did not spend advertising funds
- a 30 percent plus increase in annual arrivals from an origin where Hawaii has recently spent a substantial proportion of its advertising budget also occurred in two prior years within the past ten years – in both these prior years Hawaii had spent little funds promoting the State to this particular origin.

Evaluating the impact of an intervention program – such as a marketing/advertising campaign to attract visitors – requires professional training in evaluation research methods. This training includes knowing the theory and

methods for valid assessment found in the relevant literature [e.g. Banks, 1965; Campbell, 1969; Cook, 1997; Shadish, Cook and Levitton, 1991]. Campbell [1969, p. 411] briefly reviews nine threats to the internal validity of research design that may prevent the conclusion that treatment effects (e.g., DMO marketing actions) influence dependent metrics (e.g., tourists' requests for visitors' guides described in advertisements and "conversion rates" of visits to a destination following the mailing of such guides).

1. *History:* events, other than the experimental treatment, occurring between pretest and posttest and thus providing alternate explanations of effects.
2. *Maturation:* processes within the respondents or observed social units producing changes as a function of the passage of time per se, such as growth, fatigue, secular trends.
3. *Instability:* unreliability of measures, fluctuations in sampling persons or components, autonomous instability of repeated or "equivalent" measures. (This is the only threat to which statistical tests of significance are relevant.)
4. *Testing:* the effect of taking a test upon the scores of a second testing; the effect of publication of a social indicator upon subsequent readings of that indicator.
5. *Instrumentation:* in which changes in the calibration of a measuring instrument or changes in the observers or scores used may produce changes in the obtained measurements.
6. *Regression artifacts:* pseudo-shifts occurring when persons or treatment units have been selected upon the basis of their extreme scores.
7. *Selection:* biases resulting from differential recruitment of comparison groups, producing different mean levels on the measure of effects.
8. *Experimental mortality:* the differential loss of respondents from comparison groups.
9. *Selection-maturation interaction:* selection biases resulting in differential rates of "maturation" or autonomous change.

Figure 1 shows a design that incorporates measurements in multiple time periods in multiple markets that assist in reducing these threats to internal validity. For example, history as a threat is reduced since other events since other events would likely occur in all four sets of markets and not just the (1) markets receiving the large increase (3X advertising) in Figure 1. A full discussion of internal and external threats to validity is beyond the scope of the present article; the point here is that knowledge about such threats and training in reducing them is a necessity in planning DMO marketing strategies and in performance auditing of DMO marketing actions and outcomes [see Shadish, Cook and Campbell, 2001 for an ad-

vanced discussion of threats to validity]. The review of the 2003, and prior, Hawaii performance audit reports does not provide information regarding the extent to which formal assessment training has taken place by The Auditor, executives in The HTB, or executives in the HCVB. The reports do not include references to the literature on field testing of program impact.

Another central issue is that the 2003 report peripherally addresses the extent that specific actions were taken by the HVCB and HTA during the two review years. Kotler [1997] and others [e.g., Bonoma, 1985; Carton and Hofer, 2006; Clifford and Cavanagh, 1985] emphasize that examining and reporting specific actions taken (e.g., process data) is necessary in evaluation research. A particular year's good or bad performance may be due to an industry trend, good or bad luck, rather than excellent or poor planning and implementing actions. The 2003 management performance audit report does not address or meagerly addresses the following issues that relate to implementing strategies of the HTA or the HVCB:

1. What method did HVCB use in making funding allocations for various national origin markets?
2. Why did HVCB use particular advertising media and not others (e.g., television versus magazines versus internet sites versus newspapers)?
3. How did HVCB go about deciding on the advertising position message and information packet offer to inquirers
4. Was testing of advertising creative work done? If yes, how was such testing done?
5. Were inquiry-conversion-to-visitor studies done? If yes, what were the findings?
6. Did a specific person or team participate in designing and implementing studies on the effectiveness of tourism management actions and outcomes in the HTA and the HVCB?
7. What actions were taken in both selecting and evaluating subcontractors (e.g., advertising agencies) by the HVCB? Did the HTA participate in these actions?
8. Did the literature sent to inquirers influence length of visitors' stays in Hawaii or expenditure levels compared to visitors reporting not asking or receiving such literature?
9. Was a written marketing plan crafted by the HVCB for implementing the two contracts received? If yes, what actions implemented matched the plan and what actions did not match the plan?
10. Are management performance audits of tourism management performance done by other state government auditors available? If yes, what are the findings of these audits and what best practices are implied by these audits?

The third central issue that the 2003 report does not address is the scanning and sense making activities done by the HTA and the HVCB. All marketing strategy textbooks include recommendations and methods for gathering intelligence of (1) customer and competitor behaviors, (2) segmenting customers by demographics, psychographics and product-services use, and (3) customer acceptance of alternative advertising messages and responses to alternative media strategies; the marketing and organizational studies literatures view collecting gaining such intelligence as a fundamental requirement in planning effective strategy [e.g., see Neil, McKee and Rose, 2007; Weick, Sutcliffe and Obstfeld, 2005]. The report includes no section on the understanding and sense making views of Hawaii as a destination brand held by the HTA or the HVCB. What are the HTA and the HVCB's assessments of how different customer segments view their visits to Hawaii? What data and data analyses were collected and performed to assess different markets and market response likelihoods to the State of Hawaii's marketing expenditures? What are the HTA and HVCB's descriptions of tourists' stream of thoughts and actions that result in visits to Hawaii? Do the HTA and HVCB have data and knowledge that explain why key potential (targeted) travelers do not visit Hawaii? Has the HTA or HVCB created detailed written descriptions of specific Japanese, west coast (U.S.), east coast (U.S.), and German visitors to Hawaii? Are the answers to these scanning issues accurate – what evidence exists to support the accuracy of the answers? The Hawaii 2003 Audit Report provides no indication that these issues were considered by HTA, HVCB.

Figure 2 summarizes the key issues relating to both managing tourism marketing programs and auditing of these programs. Note that in Figure 2 adds a meta-evaluation level review on top the evaluations by the program executives and the auditor that appear in Figure 2. A meta-evaluation refers to an independent evaluation of the performance auditor's actions and report as well as the DMO actions and outcomes. The meta-evaluation templates for conducting such meta-evaluations are part of the contribution that the present article makes to the program evaluation of tourism management performance.

While HTA and HVCB executives may have access to tourist data, the assumption that they have deep knowledge about the data and are skilled in using information about leisure and meeting/convention/incentive customers to build the brand, Hawaii, needs explicit examination. This level of analysis should be collected and reported by the State of Hawaii Auditor. Does the auditor find explicit sense making consensus and extensive knowledge about customer segments among HTA and HVCB executives concern-
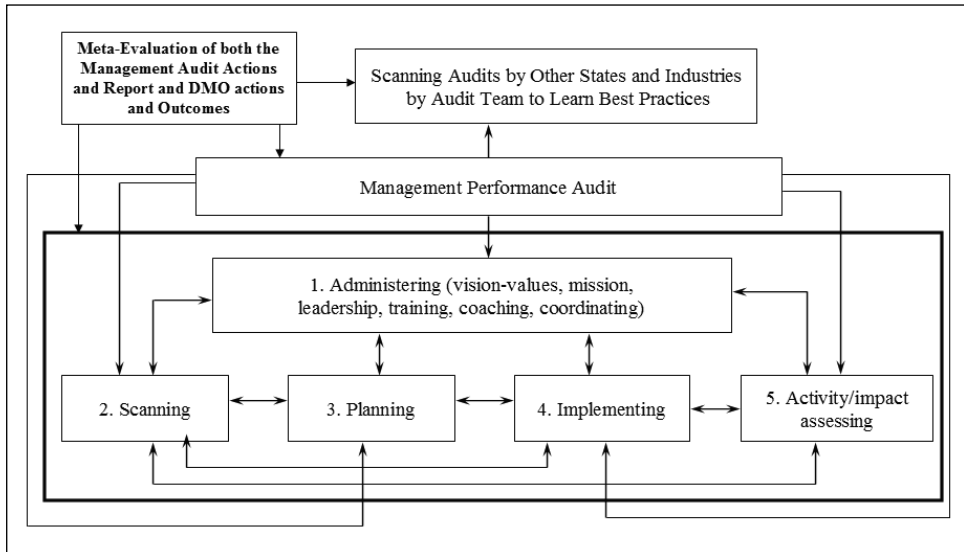
Figure 2. Performance Audits of Marketing Department and Meta-Evaluation

ing the key origin markets-to-target and the actions necessary to take for an effective marketing strategy? Such an issue and the other concrete scanning issues should be reported in some depth in the audit report.

Figure 2 includes the potential usefulness of examining tourism management performance audits done by other states. The tourism management performance audits by the Auditor of the State of Hawaii never discuss the practices and findings of other similar state's tourism management performance audits. Woodside and Sakai [2001] conclude that such examinations would increase the effectiveness in planning and implementing of such audits.

The argument might be made than an extensive audit on the scanning, planning, and implementing activities of the HTA and HVCB may appear to be prohibitively expensive for Hawaii's Auditor. Currently, extensive audits only are conducted about once every ten years or less – not only for Hawaii but for other states as well [Woodside and Sakai, 2003]. For example, the management performance audits of HTA and HVCB are being done once every decade by the State Auditor. However, justification for extensive management performance audits is reasonable and necessary for at least two reasons.

First, the present program audits are likely done too infrequently – a once-per-decade audit program offers great potential for ignoring audit recommendations from one decade to the next and several DMO executives are likely to no longer be employed across decades. Given that approximately $152 million is contracted for every two-year period or $758 million over

ten years, a budget of $ 5 million for extensive management performance audits done every second year (the $5 million would cover the total costs of 5 extensive management performance audits done within a ten year period) represents less than 1 percent of the decade's total tourism management contract expenditures.

Second, the outcomes of the Hawaii tourism management performance audits conducted once every decade offer the same conclusions: poor performance by the HTA, its predecessor, and the HVCB. (Later sections in the article present specific findings and conclusions of the 1987 and the 1993 management performance audits.) The State of Hawaii legislative branch,

Activity/Decision	Did Auditor Collect?	Absence Noted?	L1	L2	L3	Accuracy?
		Level Observed				
Scanning						
• Evidence of formal scanning reports?						
• Formal SWOT assessment done?						
• Market-by-market analysis: S/D?						
• Trends identified formally?						
• In-depth research & knowledge of customer segments/targets?						
Planning						
• Up-to-date written marketing plan for tourism-marketing program?						
• Marketing plan includes written milestones of schedule actions?						
• Evidence of 'what if' reflection/analyses?						
• Formal testing of alternatives? Before and/or after et execution?						
• Formal projections of cost/benefit analysis of planned actions?						
Implementing:						
• Evidence of on-the-job coaching and coordination and/or lack?						
• Have service-performance-process maps been created/used?						
• Written monitoring guidelines established/ followed?						
• Vital competencies done in-house?						
• Formal system for noting/responding to critical incidents?						
Activity/impact assessing:						
• Realized/planned strategy match?						
• Multiple dependent impact measures?						
• Cost/benefit analysis?						
• True experimental marketing impact?						
• Administering of marketing impact?						
Administering:						
• Written mission statement prepared?						
• Annual quantitative objectives established?						
• Evidence of training coordination, coaching by senior executives?						

Note: SWOT = strengths, weaknesses, opportunity, threats; S/D = supply and demand analysis; Levels: L1 = found to be poorly done; L2 = found to be done adequately; L3 = found to be done in superior manner and/or superior performance outcome noted. Accuracy = meta-analysis evaluation of validity of auditor's conclusion on activity/decision

Figure 3. Key Issues Template in a Meta-evaluation of Performance Audits of State Tourism Development Departments

the Governor, and taxpayers might consider breaking through this three decade cycle of poor performance reports followed by continuing poor DMO performance and strategy practices.

Evidence is lacking that the State of Hawaii has adopted sound scanning, planning, implementing, and controlling/auditing of tourism marketing strategies following the 1987-1993-2003 shallow audit reports. Three decades of very similar reports of poor performance warrant applying a new approach. This new direction should include extensive training and skill-building in both effective management practice and management performance auditing and evaluation research methods to be completed by HTA and HCVB executives as well as the State Auditor.

Figure 3 builds from the Woodside and Sakai's [2003] performance activity template. This approach that goes beyond the "balanced scorecard" perspective [see Kaplan, 1984; Kaplan and Norton, 1996, 2001] and evaluates the impact as well as executive planning and implementing activities by such organizations as the HTA and HVCB. Note that Figure 3 raises the issue as to whether or not the audit report states that the auditor collected such activity data.

Meta-Evaluation of Two Prior Audit Reports

Assessing the 1993 Hawaii Tourism Management Audit Report

The 1993 performance audit of the State of Hawaii's tourism-marketing program was performed under the direction of Marion M. Higa, the State Auditor. This 32-page report includes two papers and responses by executives of the HVB and the Department of Business, Economic Development, and Tourism (DBEPT). Although less comprehensive, the 1993 report's findings and recommendations are remarkably similar to the findings and recommendations in the 1987 report. However, the 1993 report notes that potential improvements in managing the tourism-marketing program were made after the 1987 audit report:

> In 1990, the Legislature created the Office of Tourism in DBEDT to coordinate and plan tourism development. State funds for tourism marketing activities are channeled through this office. The office contracts with HVB and other tourism promotion programs. Currently, the Office of Tourism has separate contracts with the HVB and with each of the HVB papers on the islands of Hawaii, Kauai, and Maui. The office is responsible for monitoring HVB and performing annual reviews to ensure the effective use of state funds [Hawaii, 1993, p. 2].

Chapter 1 Introduction (3 pages) reports, "As Hawaii's designated tourism marketing organization, HVB in FY 1992-93 received over 90 percent of its $20 million budget from the State. In 1993, the Legislature appropriated nearly $60 million for fiscal biennium 1993-1995 to fund tourism promotion projects" [Hawaii, 1993, p. 1]. Note the state's funding share of HVB has increased from 80 percent in 1986-87 to over 90 percent in 1992-93. Bonham and Mak [1996] describe the "free rider" behavior by tourism industry members that is associated with substantial HVB expenditures and management efforts to solicit membership dues each year. Also:

> Lobbying, or rent seeking, is also costly. HVB has three full-time political lobbyists, excluding its corporate officers who also actively lobby at the legislature. Moreover, HVB's increasingly aggressive lobbying at the legislature for money has tarnished its public image and reputation. Indeed, one critique of HVB recently observed that 'the HVB remains' focused mostly not on building tourism but on building a budget [Rees, 1995, p. 5 and Bonham and Mak, 1996, p. 6].

The following statement is the complete "Summary of Findings" in Chapter 2 in the 1993 audit report:

> The Hawaii Visitors Bureau (HVB) and the Department of Business, Economic Development and Tourism (DBEDT) have fallen short in fulfilling their respective responsibilities for the State's tourism program.
> 1.   The HVB board of directors has been weak and exercised little oversight over HVB.
> 2.   Unclear functions and underutilization of its own market research information weaken HVB's marketing efforts. HVB has yet to resolve the status and roles of its regional offices on the mainland and its papers on the neighbor islands.
> 3.   HVB reports do not comply with requirements in its contract with DBEDT and do not show whether public funds are properly and effectively utilized.
> 4.   In the absence of strong HVB board and management leadership, DBEDT has begun to direct HVB to undertake certain programs. This conflicts with DBEDT's responsibilities for monitoring the HVB contract. [Hawaii, 1993, p. 5]

A close reading of the 1993 audit report (and the prior 1987 and post 2003 reports) indicates that Hawaii has an unnecessary and costly layer of tourism-market program management. Most efforts spent coordinating and monitoring activities between the DBEDT and the HVB could be spent more profitably on effectively and efficiently managing government tour-

ism-marketing programs. Even if HVB's performance improves, the State's Office of Tourism would benefit greatly by mastering these vital competencies rather than contracting them out.

The recommendations in chapter 2 include reducing the number of directors on the HVB board, providing written guidelines for committee members, and developing a (written) strategic plan. The recommendations include the DBEDT "submitting annual reports to the Legislature that contain the information requested by the Legislature on tourism promotion programs and their effectiveness" [Hawaii, 1993, p. 17].

The HVB and DBEDT Responses and the Auditor's Response to the Responses

The HVB president commented that many of the audit report's recommendations reflect inordinate concern for developing "formal" practices. The auditors' responds, "We note that a certain minimum level of written procedures and instructions is required for any organization to operate effectively."

The director of the DBEDT did not respond directly to recommendations. "Permit me to offer the following general comments, rather than a point-by-point rebuttal," stated Mufi Hanneman, DBEDT's Director, by letter on December 27, 1993 [Hawaii, 1993, p. 28] The audit report criticizes the DBEDT for having the HVB undertake tourism initiatives developed by the DBEDT. The director's response defends the department's authority to undertake tourism initiatives regardless of whether they are planned or not. The auditor's responds, "We believe, however, that the department should undertake these initiatives in its own name and not under that of HVB". [Hawaii, 1993, p. 21].

Meta-evaluation of the 1993 Hawaii Management and Financial Audit Report on the HVB and Its Relationship with the State

The 1993 report supports the main findings strongly using detailed findings. However, the range of topics that the report covers is disappointing. Whereas the 1987 Hawaiian audit report is comprehensive, the 1993 audit report is limited. Unlike the 1987 audit report, the 1993 report does not include the attempt to identify best practices in government tourism-marketing programs. The 1993 report omits detailed information on the scanning and planning activities of the HVB and the DBEDT. The 1993 audit report does not include a financial audit report, even though "financial audit" appears in the report's title. The 1993 audit report fails to examine the effectiveness and efficiency of the HVB's tourism-marketing programs.

Other than reporting that the "HVB reports do not comply with requirements in its contract with DBEDT and do not show whether public funds are properly and effectively utilized [Hawaii, 1993, p. 5]," the 1993 audit report fails to report HVB's own attempts, if any, to measure the effectiveness and efficiency of its tourism-marketing programs.

In brief, the 1993 audit report is substantially lower in quality compared to the 1987 audit report. Figure 4 is a partial summary of the 1993 audit report's meta-evaluation [for the complete summary see Woodside and Sakai, 2003].

Activity/Decision	Did Auditor Collect?	Level Observed				
		Absence Noted?	L1	L2	L3	Accuracy?
Scanning						
• SWOT assessment?	No	No				NA
• Market analysis: S/D?	No	No				NA
• Trends?	No	No				NA
• Research: customer segmenting?	No	No				NA
Planning						
• Written marketing plan	Yes	Yes	L1			Accurate
• Evidence of 'what if' analyses?	No	No				NA
• Formal testing of alternatives?	No	No				NA
Implementing:						
• Milestones established?	Yes	Yes	L1			Accurate
• Written monitoring guidelines established/ followed?	Yes	Yes	L1			Accurate
• Vital competencies done in-house?	No	No				NA
Activity/impact assessing:						
• Realized/planned strategy match?	Yes	Yes	L1			Accurate
• Multiple dependent impact measures?	No	No				NA
• Cost/benefit analysis?	No	No				NA
• True experimental marketing impact?	No	No				NA
Administering:						
• Quality of written mission statement?	Yes	NA			L3	NA
• Annual quantitative objectives established?	No	No				NA
• Evidence of training coordination, coaching?	Yes	Yes	L1			Accurate

Note: SWOT = strengths, weaknesses, opportunity, threats; S/D = supply and demand analysis; Levels: L1 = found to be poorly done; L2 = found to be done adequately; L3 = found to be done in superior manner and/or superior performance outcome noted. Accuracy = meta-analysis evaluation of validity of auditor's conclusion on activity/decision

Figure 4. Completed Key Issues Template in a Meta-evaluation of the 1993 Hawaii Performance Audit of the Division of Travel and Tourism

The following categories and descriptions are a further summary to the 1993 Hawaii management audit report of the HVB:

- coverage of history and budget   – incomplete;
- clarity of writing   – good;
- theory applied   – a post positivistic audit;
- coverage of issues   – limited;
- style   – confrontational;
- likely size of impact   – little to none;
- overall performance quality of report – medium.

Assessing the 1987 Hawaii Tourism Management Audit Report

Hawaii's 1987 performance audit report comprehensively covers scanning, planning, implementing, measuring results, and administering by the Hawaii Department of Planning and Economic Development (DPED) and the Hawaii Visitors Bureau (HVB). Following Scriven's [1980] theory of evaluation, the 1987 Hawaii audit is a prototype of a very good audit indicating very bad performance overall by both the DPED and the HVB.

Funding to run the HVB comes mostly from the State of Hawaii, "Today, legislative appropriations account for nearly 80 percent of HVB's operating budget" [Hawaii, 1987, p. 33]. Legislative statues mandate that tourism marketing funds be appropriated to the state agency charged with tourism development, DPED, "that agency would then enter into a contract with HVB for the promotion and development of tourism" [p. 33].

During the 1970s and 1980s the Hawaiian Legislature passed several statues mandating the DPED to direct the State's tourism-marketing program and requiring that the HVB follow DPED's directives. Substantial evidence is found throughout the 1987 audit report that both the DPED and HVB have ignored these statues. The report concludes that too much time and effort are spent attempting to communicate and coordinate actions between DPED and HVB administrators and staff; the resulting quality of managing Hawaii's tourism-marketing program is very low.

> The bureau [the HVB] enjoys the operating freedom of a private organization with virtually guaranteed, substantial state funding but with no need to produce profits, unhampered by the reviews and controls of a regular state agency, and accountable to no one for organizational effectiveness. As pointed out in Paper 4, the Department of Planning and Economic Development (DPED) has not been aggressive in enforcing its contract with HVB. Theoretically, the State could contract with any other organization or organizations for all or part of its tourism marketing services. At one time, the Legislature directed DPED to contract directly for tourism advertising. But over time, HVB has convinced state decision makers that it is the best entity to market tourism for the State. Except for the review of its annual budget request at the Legislature, HVB is not held to account. [Hawaii, 1987, p. 97].

The Contents of the 1987 Hawaii Performance Audit Report

This audit report has 221 pages. The audit is organized into ten papers followed by comments (a letter plus 4 pages) by Roger A. Ulveling, Director of the DPED, and by comments (17 pages in a letter) by Walter A. Dods, Jr. (HVB Chairman of the Board) and Stanley W. Hong (HVB President).

The auditor recommends that "An office of tourism be established in the Department of Planning and Economic Development that is headed by a deputy director... The office should also strengthen the State's role in budgeting, including the restoration of the tourism program as a separate and identifiable program in the executive budget" [Hawaii, 1987, p. 69]. Given the substantial number of statues passed by the Hawaiian government, requiring the state to manage tourism programs, including the state's tourism-marketing programs, and given the serious shortcomings in the marketing efforts of the HVB reported by several sources, the Director of the DPED might be expected to support the auditor's recommendations for an Office of Tourism and a Deputy Director of Tourism. However, Mr. Ulveling and the DPED disagreed: "It [the response by Mr. Ulveling and the DPED] does not agree with our recommendation that an office of tourism be established. It also does not see the need to maintain the State Functional Plan for Tourism" [Hawaii, 1987, p. 197].

Close reading of DPED's response to the management audit supports the conclusion that the state has abdicated tourism leadership and management responsibilities. For example, the DPED response includes the following statement in response to the recommendation that an Office of Tourism and Deputy Director position be created in the DPED:

> The report comments unfavorably on the current DPED economic development organization. The implication is that creation of a branch within a line division rather than the former staff office is detrimental to the tourism mission of the department. While it may appear that the change in reporting level decreases visibility and departmental support, in fact the opposite is true. With the addition of a division head and staff, the tourism branch now has more people available to assist and support it than ever. The division head and professional staff backs up the branch manager in preparing various documents, attending meetings, and administering contracts. [Hawaii, 1987, p. 203].

This response is inconsistent with the view that DPED is responsible for leading and managing the state's tourism-marketing programs. Also, the response does not suggest that tourism behavior and industries are central to the economic well being of the state. Having the state's senior, full-time, head of tourism operations be branch manager who reports to a division head, who reports to a deputy director, who reports to the director of DPED, more than suggests that the DPED has decided to be minimally involved in tourism. Note that the branch manager's role is described to be one of "preparing various documents, attending meetings, and administering contracts." The DPED's response indicates little responsibility for senior man-

agement activities regarding tourism marketing. Also, note that in 1987 the head of this three-person branch (including a secretary) administers the contract with the 89-member staff of the HVB.

Poor performance of the DPED in all areas or responsibility is the main finding in Chapter 4.

> We find the following: (1) Despite repeated studies and agreements over the years about the State's goals, objectives, and policies for tourism, there has been little consideration or concerted efforts towards attaining these objectives. (2) Although the Department of Planning and Economic Development (DPED) is the State's lead agency for tourism, the State has yet to implement a tourism program because the department has played a reactive and passive role. There is an absence of leadership and focus to its efforts. (3) The department has yet to clarify its responsibilities for the tourism program *vis-à-vis* those of the Hawaii Visitors Bureau (HVB). The lack of clarity has lead to problems in administering and monitoring the State's contract with the bureau. (4) Because of the department's lack of initiative and its failure to identify and clarify its responsibilities for the State tourism program, some important government responsibilities for tourism are overlooked". [Hawaii, 1987, pp. 37-38].

Chapter 4 indicates agreement "that the State has a broader role to play than HVB. The State is responsible for the entire tourism program. This [responsibility] would include coordinating infrastructure needs, monitoring the industry and its impact on the community [and the environment], and ensuring the [high] quality of the visitor industry generally" [Hawaii, 1987, p. 39]. Chapter 4 reviews several reports by the DPED and details of the "State Tourism Functional Plan" passed by the Legislature supports the view that the public sector is the lead organization to administer State objectives and policies of the State Tourism Functional Plan. However:

> Despite this long history of repeated demands for a larger government role and the existence today of an agency that says it is responsible for being a lead organization for tourism, the same complaints are still being heard…. The State appears to have gone full circle. The same complaints that were being made in 1957 are still being heard today. The need for coordination remains. Infrastructure continues to be a problem. The impact of the visitor industry on the State is of continuing concern. And government is still being prodded to assume its responsibilities for tourism. [Hawaii, pp. 47-49].

Chapter 4 reviews specific lack of managing activities by the DPED. For example, "DPED has not budgeted funds for tourism promotion or for a tourism program. Instead, DPED merely forwards HVB's budget requests without analyses [to the Legislature]. The department testifies be-

fore the Legislature on HVB's budget request, but there is no analysis of whether the amounts requested for promotion are insufficient, adequate, or too much" [Hawaii, 1987, p. 51].

The following false view (i.e., theory of advertising program evaluation) expressed by the 1986 Director of the DPED, Kent M. Keith, to the Legislature reflects the primary cause for the lack of high quality studies on advertising effectiveness of tourism-marking programs. Note that responding to Mr. Keith's propositions; the audit report identifies the solution, even though the audit report does not describe the availability of scientific tests to measure the impact of advertising and other marketing actions.

> In 1985, the director [of the DPED, Kent M. Keith] commented in his testimony that while it was impossible to estimate the share of the additional $300 million increase in visitor expenditures for 1987 for which HVB was responsible, even a relatively small share would have handsomely repaid the State's investment. The director believed that the investment was repaid many times over. This kind of testimony provides little assistance to legislative decision makers. Such statements reflect DPED's general lack of concern [about] or information on the impact of funds appropriated to HVB and the effectiveness with which they are expended. The department has neither developed a system for oversight of HVB nor identified any more useful effectiveness measures. Consequently, DPED has no means to assess existing promotional efforts or to evaluate potential new markets. [Hawaii 1987, pp. 51-52].

Chapter 5 starts by describing how unique the relationship is between the State of Hawaii and the HVB. "The Hawaii Visitors Bureau (HVB) is both similar to – and different from – government agencies responsible for tourism promotion throughout the world. It is only one of two private, nonprofit organizations promoting tourism in the United States; all other states have government-operated tourism agencies" [Hawaii, 1987, p. 71]. However, Colorado voters abolished their state's tourism board in 1993 [Bonham and Mak, 1996]; such an action is one indicator that bold action can be achieved in making changes in a state's tourism program.

The auditor's main recommendation concerning HVB's management improvements is to develop an organization plan based on a strategic plan that sets the overall direction of the program [Hawaii, 1987, p. 115]. This recommendation unlikely will become a reality given the auditor's overall finding that the HVB is "negligent in its management responsibilities." The primary response to the main HVB related findings of the audit report support this view of reality:

> While some of the findings and recommendation of the preliminary [audit] report have merit, many of the recommendations would be more appropriately addressed to a government bureaucracy rather than a private, non-profit organization. The report demonstrates an inordinate concern for developing "formal" policies and other "red tape," and thus ignores the dynamic environment within which the HVB operates and the need for immediate, opportune response to market and media stimuli. (Signed response by Walter A. Dods, Jr., Chairman of the Board, and Stanely W. Hong, President of HVB [see p. 206].

Chapter 7 provides substantial evidence supporting the findings offered in the first page of the report. "We find the following: (1) there is only limited marketing coordination among the bureau's various departments, committees, and paper offices. (2) The bureau lacks formal standards or procedures for selecting an advertising agency – its most important marketing tool and its largest cost item. (3) The bureau's marketing program has not developed or implemented any formal monitoring and evaluation procedures or mechanisms to determine the effectiveness of its marketing activities" [p. 118].

As far as measuring the impact of HVB's advertising and marketing efforts, the audit report clearly states that the HVB does not follow its own *Strategic Marketing Plan* guidelines for creating monitoring systems.

> However, despite the acknowledged importance of a monitoring / evaluation system, the HVB marketing program does not contain an integral evaluation system. Instead HVB relies on such vague ideas as the health of the industry and such haphazard methods as what people tell them [p. 138].

Even the bureau's advertising program, the HVB's largest and the most important marketing component is not subject to any kind of formal and ongoing monitoring or evaluation [Hawaii, 1987, p. 139]. The audit report goes on to suggest several methods for evaluating advertising effectiveness including the use of experimental designs: e.g. Campbell and Stanley [1963] – true experiment approach, and the studies reviewed by Caples [1974] used experimental designs, as well as recall and recognition tests (these are invalid but popular methods for measuring advertising effectiveness; they are discussed in more detail below).

Chapter 8 includes a benchmarking discussion of tourism research programs in the world. The main finding reported in Chapter 8: "While the Hawaii Visitors Bureau's market research program provides the State, the bureau, and the visitor industry with valuable data, it has a number of problems which contributes to its inefficiency in certain areas, reduce its effectiveness, and limit its ability to conduct more sophisticated market research

needed to improve Hawaii's competitive edge in the world tourism market" [Hawaii, 1987, p. 145]. The audit report points out that the HVB research program is too heavily involved in statistical compilation instead of more relevant and sophisticated market research [p. 154].

The serious problems in the HVB market research continued in 1997. At that time the HVB commissioned study on advertising accountability study (Longwoods 1997). This study is based on aided-recall measurement tools to measure advertising effectiveness. The results of the 1997 study indicate spectacular high performance: $75.5 million in taxes generated by visitor spending resulting from a $7.87 million advertising investment. But two points are clear from reading the scientific literature on measuring aided-recall tests: (1) they are invalid predictors of purchase and (2) valid predictors of purchase are available (e.g., unaided top-of-mind-awareness measures and true experiments). The research design used in the HVB commissioned 1997 study is nonscientific and incorporates measurement procedures known to be invalid for estimating purchase [see Axelrod, 1968; Caples, 1974; Haley and Case, 1979; Woodside, 1990]. Consequently, the findings in the HVB commissioned 1997 study are likely gross overstatements of Hawaii's advertising impact on visits to the state.

Responses by the DPED and HVB

The DPED disagreed with the principal recommendations in the 1987 audit report. The main response by the HVB board chairman and the president has been described: the HVB is a private non-profit organization that should not be bound by bureaucratic procedures and red tape. Other relevant points are that 80 percent of HVB funds came from the state; more importantly, the audit report supplies ample evidence to support the findings, and the report's recommendations match well with the components described earlier for effective and efficient government, tourism-marketing programs.

Meta-evaluation of the 1987 Hawaii Management Audit Report

This report includes a useful (even though incomplete) review of relevant management and research literature pertaining to government tourism-marketing programs. The 1987 Hawaii management audit offers ample and specific evidence to support the report's findings. Systematic recommendations are provided covering scanning, planning, implementing, measuring results, and administrating Hawaii's tourism program. These recommendations are sound and their adoption would likely increase the

effectiveness and efficiency of the state's tourism program. Unfortunately, the recommendations are unlikely to be adopted, given the strong negative responses to them by the DPED and HVB. Figure 5 is a partial summary of Woodside and Sakai's [2003] meta-evaluation of the Hawaii 1987-management audit report.

Activity/Decision	Did Auditor Collect?	Level Observed				
		Absence Noted?	L1	L2	L3	Accuracy?
Scanning						
• SWOT assessment?	No	No				NA
• Market analysis: S/D?	Yes	Yes	L1			Accurate
• Trends?	Yes	No		L2		NA
• Research: customer segmenting?	No	No		L2		NA
Planning						
• Written marketing plan	Yes	No	L1			NA
• Evidence of 'what if' analyses?	No	No				NA
• Formal testing of alternatives?	Yes	No	L1			NA
Implementing:						
• Milestones established?	Yes	Yes	L1			Accurate
• Written monitoring guidelines established/ followed?	Yes	Yes	L1			Accurate
• Vital competencies done in-house?	Yes	Yes	L1			Accurate
Activity/impact assessing:						
• Realized/planned strategy match?	Yes	Yes	L1			Accurate
• Multiple dependent impact measures?	No	No				NA
• Cost/benefit analysis?	Yes	Yes	L1			Accurate
• True experimental marketing impact?	Yes	Yes	L1			Accurate
Administering:						
• Quality of written mission statement?	Yes	NA			L3	NA
• Annual quantitative objectives established?	No	Yes	L1			Accurate
• Evidence of training coordination, coaching?	Yes	Yes	L1			Accurate

Note: SWOT = strengths, weaknesses, opportunity, threats; S/D = supply and demand analysis; Levels: L1 = found to be poorly done; L2 = found to be done adequately; L3 = found to be done in superior manner and/or superior performance outcome noted. Accuracy = meta-analysis evaluation of validity of auditor's conclusion on activity/decision

Figure 5. Key Issues in a Meta-Evaluation of the 1987 Hawaii Performance Audit of the Division of Travel and Tourism

The following statement summarizes Woodside and Sakai's [2003, p. 636] conclusions following their review of the 1987 and 1993 Hawaii tourism management performance audits:

The course of action most likely to move the State of Hawaii's tourism-marketing program away from its pervasive ineffectiveness and inefficiency is more a dramatic step: creating a separate Department of Tourism and ending the state's relationship with the HVB. Given the unusually high importance of tourism for Hawaii compared to other states, and given the evidence in the 1987 audit report and more recent evidence, warrants a new state department of tourism. Some states have made dramatic changes in administering their tourism programs (e.g., Colorado in 1993) [see Bonham and Mak, 1996]; consequently, enacting and implementing such a paradigm shift by Hawaii is feasible.

Based on the discussion presented above, a summary evaluation of the 1987 Hawaii audit report includes the following categories and descriptions:

- coverage of history and budget – excellent
- clarity of writing – excellent
- theory applied – a Scriven-type, post positivistic audit
- coverage of issues – comprehensive
- style – highly confrontational
- likely size of impact – little to none
- Overall performance quality of report – high.

Developments Following the 2003 Report

On July 28, 2003, a month following the official release of the 2003 tourism management audit report, the *New York Times* published an article entitled, "After a Century of Luring Tourists, Hawaii Visitors Bureau Is Stripped of Its Worldwide Reach."

Here are a few excerpts from the story:

- The Hawaii Visitors and Convention Bureau, in one form or another, has been the islands' primary marketing representative to the world for the last century. But late last week, the Hawaii Tourism Authority, a cabinet-level board that oversees the state's tourism spending, divided the worldwide marketing contract among five entities, stripping the private, non-profit visitors' bureau of its international component. The shift in who will present Hawaii's public face to world travelers is only the latest cloud to shadow the tourism industry, which accounts for roughly a quarter of the state's economy. A state auditor's report in June questioned the bureau's accounting practices and use of state money, including some personal expenses that its chief executive, Tony Vericella, charged to the bureau. Mr. Vericella, who resigned July 21, is repaying $1,000 in what officials said were inappropriately charged expenses.
- Rex Johnson, the chief executive of the tourism authority, said the audit did not affect the awarding of the contracts, which he said was largely completed before the report came out. The contracts were awarded in bidding that for the first time allowed bidders to compete for parts of the marketing program rather than the entire package, a change that authority executives said was intended to give companies other than the visitors' bureau a real chance to compete. The Hawaii Visitors and Convention Bureau won the largest part of the program, an annual contract worth about $15 mil-

lion to lure tourists from North America. About four million North Americans visited Hawaii in 2002, the largest group. But responsibility for Japan, Hawaii's second-largest market with about one and a half million visitors last year, went to Tokyo-based advertising agency Dentsu Inc., with an anticipated $6 million budget. Marketing in Europe, Oceania and the rest of Asia was awarded to other groups. The visitor's bureau also kept a $1.4 million contract to lure meetings and incentive travelers. The four-year contracts were expected to total $25 million annually, with exact budgets to be negotiated.

- Joseph Patoskie, an associate professor at Hawaii Pacific University's school of travel industry management, said the changes in the marketing strategy could provide new inroads to markets in an increasingly competitive world. ''It's not saying that H.V.C.B. was doing a bad job, but there's a level of competition out there today that may require us to think in a different fashion,'' Mr. Patoskie said.

- David Carey, chief executive of Hawaii-based hotel company Outrigger Enterprises and a former tourism authority member, said: ''It remains to be seen whether a multitude of contractors is going to be as effective as a single coordinated contractor. The H.V.C.B. has taken a horribly bad rap for being incredibly effective over the last several years. If you look at Hawaii compared to other destinations, Hawaii is doing phenomenally well. All of these fundamental changes are out of proportion to the things that could have been made better.''

David Carey's conclusion about the HVCB being "incredibly effective over the last several years" appears to be inaccurate given the consistent negative findings in the 1987, 1993, and 2003 audit and may reflect the poor oversight management performance of the HTA in years prior to the 2003 report – Mr. Carey served as a member in 1998 and member and vice chair of the HTA in 1999. Mr. Carey's hint that "a multitude of contractors" may not be "as effective as a single coordinator contractor" further implies that as a single contractor that the HVCB was effective even though all three audit reports conclude otherwise.

Note that the *NYT* story includes quotes from two other persons (Rex Johnson and Joseph Patoskie) implying that neither the 2003 audit nor HVCB contract performance had little to nothing to do with the stripping of the HVCB of its worldwide reach. While such statements may be politically useful as socially face-saving ointments, along with the comments by David Carey the statements serve to lessen the perceived accuracy and value of the 2003 audit report.

Limitations of This Case Study

The reviews here of the audit reports may be more substantive and useful than the veracity of the evaluations and evidence in the audit reports themselves. No formal independent assessments of reports by state management audits appear to be available in the literature – in response to the question of who is auditing the auditors. Certainly this issue is a worthy topic for future research. Such audits of audit reports need to be undertaken within a short time frame (e.g., six months to a year) of the original audit report and include direct on-site interviews and analysis of original documents and related reports.

This article reports on a case research study for one DMO only. The conclusions are tentative and may not apply to DMOs in other U.S. States or to other countries' DMOs. Systematic research on audit reports for several States is necessary; Woodside and Sakai [2003] illustrate such research.

Recommendations for Increasing Useful Sense and Decision Making by DMO Executives and Management Auditors

The 2003, 1993, and 1987 audit reports on Hawaii's tourism management performance include no knowledge of the relevant evaluation research literature. The reports include no indications that the research literature on evaluating the processes and outcomes of marketing management is known or relevant for preparing these DMO audits. While these audits are more useful than conducting no audits, they fail to provide detailed information on the daily, weekly, or monthly activities of executives of the HTA and the HVCB and the effectiveness of these activities. For management performance audits to be informative and to serve as catalysts for improving future performance, they need to include thick descriptions [Geertz, 1973; Ryle, 1968] of actual behavior as well as rigorous measurement of impact metrics. Thick descriptions refer to an interpretation that clarify and makes sense of the interaction of specific behaviors in a given context. All three audits fail to deliver such thick descriptions.

The State of Hawaii is not alone in performing management performance audits that fail to have much impact on increasing effectiveness in managing tourism marketing programs or in measuring future performance for reviews by other state auditors [see Woodside and Sakai, 2003]. The quality of management performance audits is likely to increase substantially by applying the theories and methods from the evaluation research literature – to move beyond simply referring to following principles of sound

financial accounting auditing practice – to achieve effective audits of the organizations managing the States' tourism marketing programs. Primarily focusing on bad practices, cronyism, and corruption of funds that total less than 10 percent of total program expenditures results in too little attention on the principal objective of such audits – effective and efficient management of tourism marketing programs that achieve highly desirable results that would not otherwise have occurred.

Here is one small comfort: the severe problems with bad to no management performance evaluation auditing appear to be widespread and not limited to government tourism management performance audits. The April 2007 the American Marketing Association's *Marketing Matters Newsletter* includes the following report, "How would your company's CEO grade your marketing efforts? VisionEdge Marketing's 6th annual Marketing Performance Survey poll posed this question and others to 136 executives and marketing professionals. The results revealed a lack of confidence among respondents regarding CEOs' perceptions of marketing measurement and a gap between measurement priorities and action."

> In addition, the results indicated that despite stressing the importance of marketing measurement, many companies failed to track critical data. For instance, 63% of respondents cited increasing market share in existing markets as a top priority. However, only 37% regularly reported on market share performance indicators. Furthermore, although 58% of respondents named measuring marketing performance as a top priority, 64% admitted having no marketing performance training or budget in place. [*Marketing Matters Newsletter*, 2007].

Achieving dramatic increases in the quality of management performance audits – ending bad management audits and bad tourism management performance likely requires some form of the following actions.

(1) Recognize that the situation calls for embracing a theoretical paradigm shift in management performance audits to include both process audits and outcome audits. Such a paradigm shift needs to build from the literature of evaluation research and not just the field of accounting.

(2) Create and implement training programs for DMO executives covering sense making [see Weick, 1995], planning, implementing, and evaluation tourism management programs that rely on effective benchmark programs and the literatures on strategic management [e.g., see Kay, 1995; Mintzberg, 1978; Price, Arnould, and Tierney, 1995] and marketing management [e.g., see Kotler, 1997) -for example, to overcome the continuing bad management practices and lack of skills in managing a tourism marketing program effectively that the Hawaii Auditor reports for the HVCB.

(3) Create and implement training programs for management performance auditors on how to effectively audit both process data and outcome metrics – for example, to overcome the shallow management audit reports done by the Hawaii Auditor.

(4) Budget management performance audits of tourism management and marketing programs adequately – about three percent of the annual promotional and advertising budget for a given state tourism management program.

(5) Demand thick descriptions covering process data and outcome metrics all four major areas of management responsibility: sense making, planning, implementing, and evaluating. Such thick descriptions should describe rationales for selecting specific markets for each origin targeted to attract customers, the rationales for targeting each market with each origin national or state market, the allocation of marketing expenditures per market and the rationale for each allocation, the milestones of actions and responsibilities assigned and implemented to/by each key executive, and evidence that such implementation was done.

The mental models [see Huff, 1990; Stubbart and Ramaprasad, 1988] created will serve as the rationale for planning before and during the time period that the audit covers, the metrics created to measure process data and outcome impacts, the rationale for using specific media to communicate to each target market [see Woodside and Ronkainen, 1982; Woodside and Soni, 1990], the evaluation process that went into selecting an advertising agency and the evaluation process of the performance of this agency, the rationale for using each specific media vehicle to reach the target markets, the metrics created to measure the performance of each vehicle and each medium used in the advertising campaign, the metrics in place to compare outcomes for targeted markets versus non-targeted markets, the quasi-experimental evidence of providing literature and responding to customer requests for information versus not providing such information [see Woodside, 1996], the testing of alternative literature designs and content given to customers in response to requests, the longitudinal impact metrics over the past ten years of the tourism program, plus others. This article's intent is to serve as a call to action and training for management performance auditors, tourism management program executives, state legislators, independent near government organizations and watchdog groups, and taxpayers.

For Hawaii, possibly the only effective means of moving toward an effective state tourism program for Hawaii includes the termination of the state's relationship with the HVB in three-to-five stages. Such a decision and action would be met with stiff resistance given HVB's staff size and

focus on maintaining the status quo. Thus, Hawaii may want to consider funding the HVB with annual reductions of 20 percent per year from the current level of state support for four years-or reach some other solution resulting in a gradual dissolution of its relationship with the HVB. Even though Hawaii now could contract with a private, non-profit organization other than the HVB, the State likely would develop an effective tourism-marketing program by housing such a program in a separate Department of Tourism Programs. The Hawaii Legislature may need to stop passing additional statues in attempting to legislate competent behavior of the DPED and the HVB.

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A Brief Outline of the Academic Achievements of Arch G. Woodside and His Contribution to the Development of Tourism Research

Arch G. Woodside (born 1943) is a professor of marketing, currently working for Carroll School of Management, a part of Boston College (Massachusetts, USA). Earlier, for many years (from 1970 to 2006, with some interruptions caused by numerous guest professorships) he was employed as a professor of tourism and hotel studies at School of Hotel, Restaurant and Tourism Management, a part of University of South Carolina (where, among others, he performed the duties of a dean). Prof. Woodside began his academic career immediately on graduating from Kent State University (Ohio), where in 1965 he obtained a degree of Master of Business Administration. Three years later he was granted a doctoral degree in management at Penn State University (Pennsylvania), based on a PhD dissertation entitled *Group Influence and Consumer Risk Taking*.

A concise characterization of the lavish academic output of A.G. Woodside, especially in relation to tourism research, is by no means an easy task. His research activity is admirable[1] and research foci are exceptionally widespread, reaching far beyond the sphere of tourism studies proper. A.G. Woodside belongs to an absolute elite of academics dealing with tourism, widely recognized outside the milieus of tourism researchers. Crossing the boundaries of "the world of tourism" has resulted in his fellowships in numerous prestigious academic societies not related to tourism research, including the Royal Society of Canada (RSC), Society for Marketing Advances (SMA), American Psychological Association (APA), American Psychological Society (APS) and the Society of Consumer Psychology (SCP – he is a former President and an Honorary Fellow of this organization). A.G Woodside is also a Fellow in several tourism-related academic societies, including the Travel and Tourism Research Association (TTRA) and the most influential International Academy for the Study of Tourism (IAST). Professor Woodside has received numerous prestigious awards from some of the above academic associations, both for his particular accomplishments and overall scientific achievements (e.g., APA – 1980; APS – 1991: RSC – 2000; IAST – 2003). Professor Woodside has also won of many awards for the best papers delivered during conferences (e.g., American Marketing Association – during

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[1] This is confirmed not only by a large number and vast range of subjects analyzed, but also by a multitude of diverse research initiatives and exceptionally large number of academic centers or individual researchers collaborating with Prof. A.G. Woodside.

the Fourth "Cutting Edge Research in Retailing" Conference – 1995), as well as for the finest papers in scientific journals (e.g. *Best Article Award Journal of Business & Industrial Marketing* – 1994).

Arch G. Woodside has proven himself to be an excellent organizer, particularly of innovative and attention-grabbing interdisciplinary projects. For instance, he has outstanding achievements in integrating research on tourism and culture, two disciplines apparently closely related but often developing in their own ways. Such activities of Professor Woodside resulted in, among others, establishing the International Society of Culture, Tourism & Hospitality Research (in collaboration with Prof. J. Crotts and Prof. R. Harrill), as well as establishing and regularly editing the quarterly *International Journal of Culture, Tourism, & Hospitality Research* (IJCTHR) as an Editor-in-Chief, published by Emerald Group Publishing.[2]

Apart from IJCTHR, Professor Woodside is also the editor-in-chief of the highly rated *Journal of Business Research* (JBR), which belongs to a limited group of prestigious journals published monthly (IF for the last 5 years – 2.035).[3] A.G. Woodside was a member of editorial boards of numerous influential journals (currently 16 on top of JBR and IJCTHR) related to various scientific disciplines: marketing (e.g. *Journal of the Global Academy of Marketing Science* – Senior Editor), management (e.g. *Journal of Management and Economics* – Advisory Editor-in-Chief) and tourism research *(e.g. International Tourism Review* or *Tourism Analysis)*. All in all, Prof. Woodside has been a reviewer of papers published in several dozen journals. He is also a highly respected editor of books and monographs. Some of the several dozen publications edited by A.G. Woodside appeared as parts of thematic series. Currently he is an editor of two such series: *Advances in Business Marketing and Purchasing* (published by Emerald, earlier by JAI Press) and *Advances in Culture, Tourism and Hospitality Research* (Emerald).

The scientific activity of Professor Woodside is also noteworthy for its international dimension, both in relation to common research projects or publications (e.g. in the years 1999-2001 he was a leader of a large Australian government grant for researching the influence of the Olympic Games on tourism, worth $ 364,000) and academic exchange (or other types of international university partnerships). As a visiting professor he worked in more than a dozen universities in various parts of the world, leading doctoral seminars (he has been a supervisor of numerous doctoral dissertations and a reviewer of 14 PhD dissertations in several countries on different continents). Prof. Woodside was also a lecturer of the Fulbright Foundation in several European cities (e.g. Helsinki – 1974; Osijek – 1978 and Budapest – 1989).

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[2] "Emerald" is one of the leading science-related publishing houses worldwide (a publisher of, *inter alia*, nearly 150 science journals, most of which indexed in the Master Journal List).

[3] The journal has been published monthly since 2002. Earlier (i.e. from 1973) JBR appeared as a quarterly. The exceptionally dynamic development of the journal (e.g. in the years 1991-1996) manifested itself in one the highest increase of citation rates among all journals indexed in the Master Journal List and resulted in 12 issues per volume published during a year in the last decade. Professor Woodside has played a significant role in this outstanding achievement.

Interestingly, A.G. Woodside, a captain of the U.S. Army, realized his scientific passions as Research Psychologist during his military service in Fort Belvoir in the years 1968-1970.

The research interests of Professor Woodside are widespread and they reach far beyond the sphere of tourism studies. He is an author, co-author or editor of 44 books and monographs pertaining to the issues of marketing, psychology, management and tourism. The latter scientific interest embraces eight larger publications. One of the first books dealing with tourism research was *Consumer Psychology of Tourism, Hospitality and Leisure* (published by CAB International in 2000), which A.G. Woodside edited in an international team of authors in collaboration with four eminent tourism researchers (Geoffrey Crouch, Josef Mazanec, Martin Oppermann, and Marcia Sakai). His work co-edited with Roger March entitled *Tourism Behavior: Tourists' Plans and Actions* (CAB International, 2005) is among his most recognized and most frequently quoted books (especially its first chapter *Ecological Systems of Lifestyle, Leisure and Travel Behaviour*, in which Arch G. Woodside together with Marylouise Caldwell and Ray Spurr present an extremely interesting and universal model of analyses of human behaviors indicated in the title.[4] Another oft-quoted publication is the book *Tourism Management: Analysis, Behaviour and Strategy* (CABI, 2007), co-edited with Drew Martin. Despite the fact that tourism is now on top of the agenda of Prof. Woodside's research foci, he still remains very active in other fields, for instance his two recent books (both published in 2009): *Innovation and Diffusion of Software Technology: Mapping Strategies* (written with H. Pattison and published by Elsevier) and *Essential Knowledge for Research in Marketing* (co-edited with J. S. Armstrong and G. Zaltman, published by SAGE). Apart from books and monographs, A.G. Woodside published nearly 120 other works in conference materials. His research output seems even more impressive if measured with the number of publications in scientific journals. Professor Woodside published more than 230 papers in 27 journals representing several disciplines of science. Their analysis indicates that tourism studies have been gradually receiving more attention and thus achieving a leading position among all Prof. Woodside's research foci (cf a total of almost 50 papers pertaining to the issues of tourism research).

Although the first works of A.G. Woodside on tourism were published as early as in the mid-1970s, they began appearing in a larger scale only in the late 1990s. In this time, Prof. Woodside undertook numerous research projects – both individual and in teams – related to tourism studies perceived from various scientific perspectives (marketing, psychology or management). His observations were of interdisciplinary character and thus provided a wider spectrum of the analyzed phenomena, which in a very short time resulted in a systematically sky-rocketing number of publications related to tourism and hotel studies, as well as the increasing impact of these publications measured with a citation rate in specialist literature. Undoubtedly, A.G. Woodside has made a tremendous contribution to the development of tourism theory and research with his wide-ranging interdisciplinary academic activity.

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[4]   In Polish literature the model was broadly discussed in: Alejziak W. (2009). *Determinanty i zróżnicowanie społeczne aktywności turystycznej* [*Determinations and Diversity of Tourist Activity*]. *Studia i Monografie* No. 56; AWF Kraków; pp. 37-39.

His contribution to building and expanding the knowledge of tourism seems even more significant if we consider his efforts and successes in initiating new branches of studies related to tourism. One of such novel perspective was research on the so-called "tourist netnography" based on Internet analyses (especially such elements of world-wide web as blogs, opinion forums, social networks etc.), which resulted, for instance, in publishing one of the most fascinating works on this phenomenon: *Ethic Interpreting of Naïve Subjective Personal Introspections of Tourism Behavior: Analyzing Visitors' Stories about Experiencing Mumbai, Seoul, Singapore, and Tokyo*, written with Drew Martin and Ning Dehuang and published in IJCTHR [vol.1, 2006, pp. 14-44]. Professor Woodside is also one of the pioneers of applying a method called "storytelling" in tourism research. Its fundamental assumptions and potential applications in tourism studies were presented, among others, in the work: Woodside, A.G. and C.M. Megehee. 2009. *Travel Storytelling Theory and Practice* [*Anatolia*; vol. 20(1); pp. 86-99].

Special attention should be paid to those works in which Arch G. Woodside made valuable insights into the principles of tourism studies and undertook successful attempts at some generalizations, as well as at creating complete theories related to particular tourist phenomena (especially in the sphere of tourist consumption), as for instance in the following influential publications: *A General Model of Traveler Destination Choice,* written with S. Lysonsky (published in *Journal of Travel Research*, vol. 27(4), 1989, pp. 8-14); *A General Theory of Tourism Consumption Systems: A Conceptual Framework and an Empirical Exploration* written with Ch. Dubelaar (*Journal of Travel Research;* November 2002; vol. 41(2); pp. 120-132) and the oft-quoted paper by Polish researchers: *Grounded theory of international tourism behavior*, [*Journal of Travel & Tourism Marketing*; 2008; vol. 24(4), 2008, pp. 245-258], written with D. Matin. One of the trademarks of Arch G. Woodside's research activity are extremely suggestive schemes and various types of graphs skillfully illustrating the analyzed phenomena, which can be found practically in all the works of the Professor, who is well-known for the utmost importance he attributes to theories and methodological aspects. What seems to somehow summarize this sphere of A.G. Woodside's research is his book *CASE STUDY RESEARCH: Theory, Methods and Practice* (Emerald, 2010), which in a very short period of time has achieved paramount recognition in various academic milieus and exerted a powerful impact on researchers worldwide.

Even the brief outline presented above clearly proves that Professor Arch G. Woodside is among the most active and widely recognized tourism researchers worldwide. His contribution to the development of tourism studies is beyond any doubt admirable. Particularly noteworthy is his role in developing and maintaining international collaboration among tourism researchers practically from all corners of the world, as well as his attempts at a further integration of tourism studies with other disciplines and sub-disciplines of science, especially in the fields of psychology, culture and business.

(profile prepared by Wiesław Alejziak)

RESPECTING THE PAST, PREPARING FOR THE FUTURE; THE RISE OF AUSTRALIAN ACADEMIC TOURISM RESEARCH

*Philip L. Pearce**

Abstract: The paper considers academic Australian tourism research over the last thirty years. The overview is written from the perspective of a key and involved participant. The approach to be followed uses data and archival records as well as a subjective choice of critical incidents. Key factors considered include the state of the Australian industry at 5 year time intervals, and the associated national political support for tourism and research. The linked factors discussed include the changing role of institutions, the power of individual scholars, the issues of relevance, knowledge management and status, and the cultural context which encourages the following or the fusion of traditions. It is suggested that viewing tourism study in a wide framework and emphasising its connections to many other phenomena offers a bright future for the development of academic tourism research.

Keywords: tourism research, relevance, status, knowledge management, history, Australia.

Introduction

The attention in this paper is on the development of tourism research in one country. Hopefully, the specific focus on Australia will assist all tourism researchers to consider the forces which underpin tourism research growth in their own region. The essential task of tracking the development of academic activity in this area is undertaken not by bibliometric analysis but by a qualitative perspective which benefits from personal immersion in tourism research from its very foundations in Australia (the author is Australia's first Professor of Tourism). The argument which will be pursued here is that the growth of tourism research has been driven by a combination of funding forces and powerful individuals. Additionally, the rise of locational clusters of activity holds the key to an understanding of the flourishing of Australia's tourism academic activity.

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The paper considers academic Australian tourism research over the last thirty years. It undertakes this task in three sections; the first describes the growth of tourism study and identifies the roles of groups of people and organisational influences over the time period. A second section provides some interpretation and explanation of these developments by considering both the powerful long term influences and the immediate forces which have shaped the corpus of tourism research. A third section seeks to draw some action oriented implications from the history and notes ways in which contemporary scholars anywhere can plan their work and tourism research can be enhanced.

The approach to be followed uses data and archival records as well as some subjective choices of critical incidents to help plot the Australian tourism research story. The focus is on researchers working in Australia rather than considering the nationality of the researchers. For those interested in the development of tourism research in other locations the reading of this paper can be seen as an applied exercise in what can be considered and reported on in tracing academic growth in tourism research. Some of the key pathways to be pursued include the state of the industry, the national political support for tourism and research, the changing role of institutions, the power of individual scholars, the issues of relevance, knowledge management and status, and the cultural context which encourages the following or the fusion of traditions.

Tracking the Past

In 1982 Australia's international tourism was a fledging activity. Domestic tourism was a modest and largely Christmas time business. Prime Minister Malcolm Fraser was still more concerned with the activities arising from primary industry and the manufacturing sector rather than with tourism's potential. The country was obsessed with the trial of a woman named Lindy Chamberlain and the role of a dingo in purportedly snatching her baby. Paul Hogan, an actor, had not yet thrown a shrimp on the "barbie" (barbeque in Australia is a popular cooking style) and if you wanted to travel to the Great Barrier Reef you still faced 3-4 hours of gut wrenching ferry services. Uluru was still called Ayers Rock rather than being known by its Aboriginal name but at that location a new generation resort was in the first stages of operation. The 1982 Commonwealth Games were held in Brisbane and their success was the forerunner to Australia's growing reputation for holding significant events. A book by the noted quiz champion and politician Barry Jones

with the title "Sleepers, Wake!" identified the looming potential of the services sector and technology for Australia's future but the immediate response to this effort was slow.

If you went looking for tourism academics in Australia's universities you could find a couple of ferals; escapees from mainstream disciplines like psychology, economics, marketing and geography. If you scratched the surface a little more there were a few more tourism academics in training either completing PhDs overseas or just beginning higher degree study in Australia. Hospitality studies were confined to the colleges of advanced education, institutes of technology or the agricultural colleges and such studies were not underpinned by local research.

A search of the tourism journals reveals that John Pigram, Philip Pearce and Neil Leiper were among the first Australians publishing in the *Annals of Tourism Research, Tourism Management* and *the Journal of Travel Research*. A number of economists and marketing academics were publishing articles of tourism interest but their contributions do not appear in the tourism journals.

The wider tourism research scene was either stagnant or hidden. Consultants advising business were undertaking feasibility studies or writing tourism plans. Domestic and international visitors underpinned some expansion in the hotel sector but research work informing this growth was commercially oriented, and without standards of public appraisal. Government research was almost solely confined to record keeping and the most pedestrian forms of reporting.

By 1987 a mere five years later, there was a new surge of activity both for tourism and for its study. Prime Minister Bob Hawke was in the middle of his term and his reputation for living and working hard was in part reflected in a new attention to sport, leisure, good times and tourism. Substantial construction was underway across the country largely directed at celebrating Australia's bicentenary in 1988. Importantly the numbers of international visitors to Australia was growing sharply. Based in part on a weak Australian dollar and, combined with new energy in marketing and supported by better facilities, Japanese and North American markets in particular were growing rapidly. In 1987 international visitor numbers were around the two million mark for the first time. The financial world was struggling to understand the new economic beast of tourism and was substantially under prepared in terms of attitudes to the service sector as well as lacking research data and analytical tools. Also in 1987 Hawke's Minister for Education, John Dawkins, decided upon a reclassification of Australia's higher education institutions and through amalgamations, upgrades and renaming, most of Australia's institutes of technology and colleges of education became new Universities.

It was still not easy to find tourism academics but small bands were on the brink of forming. The upgrading of the colleges of advanced education and the institutes to university status provided them not only with a new prestige but a mandate for change and a hunt for more students. Thus the old names with the common designation CAE (College of Advanced Education) – such as Hawkesbury College, Gatton College, Northern Rivers CAE, Footscray Institute, Kuring-gai CAE and Gold Coast CAE – became some of the new ones in early tourism and have since morphed or merged into substantial concerns – respectively as the University of Western Sydney, University of Queensland Gatton and Ipswich , Southern Cross University, Victoria University, University of Technology Sydney and Griffith University Gold Coast . In 1987 however they were just emerging from the cocoon of vocational training and the staff would take some time to develop research abilities and cultures.

The Universities which were already designated as such prior to the 1987 Dawkins name changes were about to follow a different path into tourism research and education. With no background in hospitality studies and plenty of conservative academic opinion about the worthiness of tourism as a field of study, the traditional Australian capital city universities abstained from committing to tourism [Pearce, 2006]. For international comparison this is not unlike the history of tourism research and study in the United States or England where large and prestigious institutions such as Oxford, Cambridge, Harvard and Yale also had no tourism roots and little interest in an emerging specialism. Despite the low level of interest from other pre Dawkins Australian Universities, 1987 was also the date when a consortium of industry figures led by Sir Frank Moore the then Chairman of ATIA (the Australian Tourism Industry Association) and John Dart Chief Executive of AFTA (Australian Federation of Travel Agents) worked with administrators at James Cook University to establish a tourism studies centre. One outcome of this association was to advertise for Australia's first Professor of Tourism, a position to which the present author was appointed after intensive interviews. The emergence of tourism management degree programs across the spectrum of Australian Universities coincided with or followed this industry support. There was an initial consolidation of the previously feral academics into little bands where research and education were intertwined and in the next few years many of these bands became departments and centres for tourism study.

The Australian Government also became involved in tourism analysis in 1987 by setting up the Bureau of Tourism Research. This organisation which was based in Canberra was constructed in part to help the government justify its rapidly expanding promotional budget for the Australian

Tourist Commission. The Bureau became the dominant source of visitor statistics for the country's researchers. Dr Bill Faulkner became the Head of the Bureau and tried hard to accommodate entrepreneurs' needs for up to date information with the government's needs for thoroughness and the academics' demands for insightfulness. Consultancy services to the tourism industry had grown with the growth of infrastructure and some of the larger accounting firms as well as individual operators happily supplied such services without any specialist tourism knowledge or background.

Just one year later in 1988 a tourism research meeting organised by the Australian National University in association with the Australian Travel Research Workshop a government coordinating body consisting of state tourism interests was held in Canberra. It was entitled Frontiers of Australian Tourism Research. Looking at the document almost twenty years later is like examining something from a time capsule. In a pre-desk top age the typing is in a mix of fonts, the document is filled with typographic errors and the contributions vary from shallow boosterism to the insightful. The document deserves its own unique re-analysis but an expressed aim of the event it reports was to establish a network of researchers in tourism. This aim would be achieved in the next five year period.

A new element in tourism research in Australia was introduced in 1990 when The Journal of Tourism Studies was launched at James Cook University with Philip Pearce as editor. Over the next 16 years it was to provide a respectable outlet for both Australian and international research work in tourism. A defining achievement of JTS was that though its style and quality it became an accepted part of the global tourism research community while typically publishing some Australian content in each issue.

By 1992 and five years further on from the university reshuffle of 1987, tourism was blossoming in Australia. In Parliament Prime Minister Paul Keating notably called it the shining star of Australia's economic activity. The Bicentennial had not only boosted numbers of arrivals but left a legacy of museums, heritage centres and projects which were of world class.

Additionally, by 1992 the little bands of tourism scholars had worked together and become a tribe. Foreshadowing later reality television shows they had formed a tribal council – The Council for Australian Tourism and Hospitality Education – known as CAUTHE. Early attention at CAUTHE administrative meetings was given to three Rs – respect for tourism within both the community and Universities, recognition for our graduates and research funding and presentation opportunities. The CAUTHE conferences initiated in 1991 became the best recognised achievement of the Council and the focal meeting point for Australian academic tourism researchers. Many people have contributed to the success of the conferences and ap-

propriate recognition should embrace the junior staff and students as well as to the editors of conference proceedings and departmental heads. Prominent amongst the early leaders were Graham Brown, Robyn Bushell, Steven Craig Smith, Michael Davidson, Jenny Davies, Larry Dwyer, Michael Fagence, Bill Faulkner, Perry Hobson, Leo Jago, Ian Kelly, Brian King, Neil Leiper, Ian McDonald, Philip Pearce, Gary Prosser, Harold Richins, Robin Shaw, Jenny Small, Lloyd Stear, John Streckfuss, Betty Weiler and many more. Many of these people continue to contribute to these events.

During the early 1990s several tourism degree programs were happily underway although the design of courses was somewhat idiosyncratic and the texts and materials available to teach new subjects were mostly imported and sometimes unsuitable. Importantly, Australian tourism research in the Universities was limited in some important ways. Only a handful of doctoral level personnel had a full commitment to tourism publishing. The funding for studies was suffering from a kind of El Nino effect- a local drought caused by other forces- since the rise of the Bureau of Tourism Research tended to be used as an excuse as to why the government through its Australian Research Council process should not fund academic tourism studies.

Another significant decision having an influence in the early 1990s was the government's new willingness to accept international students into Australian universities on a fee charging basis. This new cohort was to have an impact on some of the tourism research in Australia. PhD students from Asia in particular would assist the internationalisation of the Australian research effort in tourism.

The Industry Assistance Commission had reviewed tourism in 1989 and identified the need for research beyond the purely instrumental and market based information needed to conduct profitable business. The attention given to social and environmental impacts in this process was to have a wide reaching effect. It coincided with international environmental concern and the Commonwealth government identified sustainability as a critical issue for its attention. Working Groups on sustainability were set up for different sectors and the group reporting on Tourism and Sustainability in 1991 was one of the more successful producing a document which was to set an agenda for future study.

An allied concern relating to the impacts of tourism at this time was the issue of foreign investment, particularly Japanese investment in Australia's tourism infrastructure. The concern surfaced in the popular press but was largely dissipated when tourism economics researchers Larry Dwyer and Peter Forsyth demonstrated acceptable economic stimulation and employment benefits to the broader Australian community.

During the Hawke-Keating governments a special kind of research funding initiative –the Cooperative Research Centres (CRCs) model was also developed. Conceived initially during Hawke's prime ministership it was designed principally by Australia's chief scientist Ralph Slayter as a three way partnership where industry, government and the research community combined to achieve mutually supportive goals. The James Cook tourism group chiefly Gianna Moscardo, Philip Pearce and Laurie Murphy became the first tourism researchers to participate in this kind of program working with both the Sustainable Reef and Rainforest CRC's from their beginnings in 1993.

A step forward to 1997 sees John Howard as Australia's Prime Minister. A different relationship between University research and the government was about to be developed. Tourism was performing solidly and numbers from Asia were climbing rapidly with few forecasters anticipating the Asian economic crises to come. There was a spirit of excitement and infrastructure creation particularly in Sydney in the lead up to the 2000 Olympics. After one initially unsuccessful attempt a Cooperative Centre for Sustainable Tourism was funded and began operation in 1997.

Tourism researchers based in Australia were gaining ground in international publishing and an array of new names joined the more established performers. CAUTHE conferences had ballooned in size although there were sometimes quiet questions asked about the quality and value of working papers. For example at the Adelaide CAUTHE meeting held at the start of 1999 only 46 out of 208 papers were refereed. This pattern reflected in part a need to find ways to fund a viable conference since funding for attendees from their institutions was often dependent on their role as presenters.

By 2002 the Olympics were over and were widely seen as an advertisement for both Australian sporting talent and Australian administrative prowess in terms of event management. The wider world of tourism had confronted and continues to experience terrorism, disease and disasters but tourism was still a mainstream economic earner for Australia. John Howard was still Australia's Prime Minister and the shifts in educational and research policy were beginning to take effect. The CRC for Sustainable Tourism had become a very important player in many sectors of the Australian tourism research community and was heavily involved in CAUTHE conferences. It involved academics from many institutions although not all were comfortable with some its directions. Its emphases were necessarily in line with government funding imperatives and like the Reef, Rainforest and Savannah CRCs which also involved tourism researchers, there was a marked emphasis on industry approval and acceptance of the research activities.

There was and is an academic dark side to this hegemony emanating from the CRC world including the CRC for Sustainable Tourism. With research funding difficult to get, any income to the Universities was valued by the senior administrators even if it was often their own money recycled. Further the support to PhD students from the CRC system provided a direct tangible benefit to the lives of academic supervisors and their students. These forces together with respect for colleagues who work in the system dampened criticism. But in the wider context of Australian tourism research some of the assumptions, epistemologies and achievements of the CRC approach need re-examination. These concerns anticipate the next section of this paper. Additionally funding from the Australian Research Council-the more fundamental and prestigious funding body in Australia has often effectively been rendered out of bounds to tourism researchers because of the existence of the CRC.

At the current time of 2011 there is relative prosperity in Australia due to significant successes in the mining sector. Arguably, investment in education is not a visible outcome of the Government's credit balance. Domestic flights are cheaper and more flexible than ever before although there are hints of the difficulties of maintaining a long term sustainable future for an oil dependent tourism industry. Prime Minister Julia Gillard is now in power and the Government's desire to emphasise the utility and impact of research are being scrutinised as various forms of apprasial are created and re-drafted by educational administrators.

Currently, the Australian academic presence in tourism is extensive and there is habitually a collection of both senior and younger Australians at conferences in Asia, Europe and North America. In the volumes of most tourism journals, as well as in most issues, there is often an Australian author making a contribution. There are several Australian members of the International Academy for the Study of Tourism and a number of leading journals have Australian researchers as senior editors and associate editors. Academic tourism researchers including some recent senior arrivals from overseas occupy leadership positions and influential roles in a range of organisations with notable links to UNWTO, TTRA, APTA and ATLAS. Kaye Chon from Hong Kong Polytechnic University is fond of using the expression the Asian Wave in describing the growth of Asian tourism development. A close examination of the research productivity in this metaphor uncovers a very substantial contribution from the Australian current. The CRC for Sustainable Tourism has completed its run but there are several institutions with solid numbers of doctoral students and productive research staff.

Interpretations and Explanations

The stages and phases implicit in the previous description of the history of Australian tourism research can be examined and explanations suggested in a number of ways. One form of explanation is psychological and biographical. The factors of the relevance of research and its knowledge transfer, the perceived status of tourism study, the competitive position of Australian tourism and the growth of Asian tourism are also involved in the explanations of the tourism research work carried out in Australia.

The Psychological Push

For academics in Australia belonging to the new tourism tribe has conferred some advantages. Many individuals have been able to be productive, to write about a diversity of topics and to maintain this productivity over the time period studied. As Becher (1989) notes in reviewing academic tribes and territories, new subject and topic areas typically lack respect but may offer opportunity. For some, embracing the role of tourism researcher has been quite simply a good career move. The gaps in most areas have permitted a number of researchers to write up much descriptive and case study material. It has been possible for a number of researchers to address many lightly explored topics and build successful personal profiles. The charge which is brought against such productivity is that "it is all academic", a commentary amounting to a labelling of the work as irrelevant and self serving (cf Andersen et al, 2001). A disciplinary opportunity-a gap in the market to use that terminology- is partly responsible for this tourism academic flowering in Australia. Unlike colleagues in the UK and the USA, recreation and leisure researchers and to some extent sociology researches have been less prominent here.

An additional comment on the characteristics of individuals working in Australian tourism research context is the relatively low administrative and managerial input of international figures to the Australian scene. At the senior level only Turgut Var, Arch Woodside and Chris Ryan (all relatively briefly) and Chris Cooper and Peter Murphy in a longer more sustained way have occupied senior positions. Certainly some of our tourism researchers, for example Betty Weiler, Brian King, Steven Craig Smith, started careers in the UK or North America but their recent history in the last decade or more has been to stay in this country. In short most of the talent is effectively home-grown. The Australian tourism research diaspora is also minimal. With the exception of Colin Michael Hall, (NZ), and Gary Prosser (Ireland) most Australian tourism researchers have stayed in Australia and while

periods of time have been spent overseas it is uncommon to find Australian academics in tourism in other settings. Some implications of this stability, despite the previously stated productivity may be limiting the reach and power of the studies done by Australian based researchers.

The Relevance Push

Many Australian tourism researchers have been heavily influenced by challenges to the relevance of what they do. This influence has stemmed in part from the prevailing government funding environment embodied most clearly in the CRC programs where industry sector personnel have roles in identifying and approving what they see as relevant projects. Additionally it can be proposed that many tourism academics have internalised this drive for relevance and seek to justify their work to others in their institution and beyond by outlining its commercial contribution and sometimes by its direct value to the host community.

The concept of relevance in tourism research has rarely been examined in detail and needs to be deconstructed. The relevance push derives from industry practitioners and persons in government who require that their scholarly community provides useful or relevant insights into their world [Fuchs, 1992]. Relevance can be seen as having six dimensions. These can be identified as follows.

- **Time.** There is potentially an immediate, mid term, long term or even generational relevance for tourism studies.
- **Sector.** There is sector and sub sector relevance with the different applicability of work to the components of the hotel/accommodation sector, the transport sector and the attractions sector.
- **Spatial scale.** There is relevance of spatial scale with some work being of local applicability some of regional import and other analyses of concern at a national or international scale.
- **Focus.** As well as the relevance of scale there is a relevance of focus which is concerned either with single units of operation or broader aggregations (such as one hotel or a hotel chain).
- **Domain.** The content area of interest may be drawn from an economic, socio-cultural or environmental perspective-the three recognised tenets of the triple bottom line (Elkington, 1997). Recent writing on sustainability tends to add an administrative or managerial dimension to sustainability discussions as this dimension identifies capacity in a location to manage sustainability.

- **Style.** And finally there is the relevance of style where either the approach to the topic (a way of conceptualising and assessing problems) or the immediacy and pragmatism of the data and results is the chief contribution.

The ways in which relevance in tourism studies has been interpreted in Australia has been problematic. Too often relevance has only been applied to work which is short term, local, sector biased, unit oriented, economic and results driven. These are not inherently bad criteria; it is simply that they are not the only criteria. Work in other styles can be relevant and valuable and as the sophistication of the research community and its users grow it can be anticipated that these wider frames of relevance will be better appreciated.

The Knowledge Management Contribution

The limited ways in which relevance has been viewed is also connected to a simplistic view of knowledge transfer and knowledge management. This is a large discussion in contemporary tourism studies. One key to understanding the use of tourism research is to recognise that the pathways to its use are varied- occasionally a direct application can be seen from one study. More often an iterative and then cumulative program of work is required and this program should give solid and reliable findings rather than scattered and idiosyncratic information. Even then, there may be circuitous pathways to the adoption of the research with multiple intermediaries between the researcher and the user. In this context an insightful guide is provided by the work of Flyvberg [2001] in his book *Making Social Science Matter*. The argument employed by Flyvberg and of use to tourism study is that in addition to their academic voices researchers who want to make a difference have to develop alternative or parallel public and rhetorical voices. This is not quite the concept of the old fashioned public intellectual but it is a view that the way to significant influence lies in engagement in the media, participation in public debates, submissions to hearings and policy processes as well as active membership of organisations. Additionally identifying and influencing transmitters, those individuals who in turn influence others is critical to knowledge transfer and ultimately uptake. As Crompton [2005] reports it is arrogant for academics to simply believe that busy professionals will be able to find, read and sort through the implications of the necessarily formal and refereed academic work. More broadly, three key concepts from the expanding knowledge management literature have the potential to alter the take up of Austral-

ian tourism research. Cooper [2006] amongst others considers the transfer of tourism research to be a long standing challenge "with few advances so far" [2006, p. 48].

The concepts which may provide a new way forward supplement Flyvberg's views and include knowledge capture, knowledge codification and knowledge diffusion. Knowledge capture involves a formative stage of mapping what people already know. There are two sources of information here; information available in an external sense as well as information which is implicit or tacit; the latter being the information in the minds of the potential research users. Importantly if researchers seek to have local, sector specific, short term relevance a key second step in the knowledge management and capture process is the alignment of researcher and user objectives at the earliest stages of research planning. Codification means a translation of research findings into a language and a medium such as decision rule systems or illustrative cases which heighten the accessibility of the material. Finally knowledge transfer is a multifaceted concept invoking Flyvberg's point about the styles of delivery as well as the roles of intermediaries and the capacities of organisations to absorb information. Even the most elegant speeches and the best writing remain undiscovered by those who are not willing or able to pay attention. In all of this literature there is a guiding view that different solutions prevail for different research goals and the simple charge that academic research is irrelevant or not well accepted will be answered by tailored solutions and a broad appreciation of relevance rather than a prescriptive set of universally applicable guidelines.

The Status Issue

It was noted in the brief history of the development of Australian tourism research that the oldest Australian Universities were not to the fore in initiating academic developments in tourism. As Becher and others have reported there is an issue of status and intellectual snobbery attached to study areas and tourism research rarely fares well in these kinds of intellectual rankings. The power of the status concerns is pervasive, penetrating many a University down into its Schools, departments and divisions when researchers compete for resources. In many fields the meaning of citation rates and the prestige of journals are neatly linked to their value. As most tourism scholars know journal rankings and citation rates are very rough and approximate guides to the quality of tourism contributions. There are those who seek to equate the tourism field with others such as business while more cynical perspectives highlight a fundamental political agenda of

reducing government expenditure on academic and discovery studies, which as driving such attempts [Page, 2005]. It is clear that the status of tourism study needs attention if researchers using this label are to be successful in the grant awarding arena in Australia (and beyond).

One difficulty for tourism is that few scholars have addresses the core intellectual problems of the study field. In general, what is that tourism researchers seek to know? How is the field defined beyond a set of studies that are useful to the business of tourism? What are the fundamental problems with which researchers must grapple to make a sustained contribution to the field? A personal attempt to identify such an emphasis is the ambitious task which will form a part of the final section of this paper.

Australia as a Research Location

Certain elements of a geographical determinism may be noted in describing and formulating the areas of focus in Australian tourism research. At the larger scale Australia's contribution to the Asian wave of tourism research and development has already been noted. The analyses of Asian markets and resource deployment in the larger Asia Pacific region is a more common topic in Australian tourism research than is typically found in Europe or North America. Similarly Australian tourism research on events, on rural and self drive tourism, on coral reefs and rainforests and on nature based tourism generally also derive from settings and tourism activities readily available to and pertinent to Australian researchers and Australian life. The marketing of Australia and the marketing of indigenous Australia have been to the fore in the action world of Australian tourism and research by academics on tourism marketing and its trends and product emphases has had a parallel strength in Australia.

It can be suggested that while Australian researchers are active especially on these regionally and nationally important topics, the corpus of work they have brought to the international knowledge arena has had a style of extending and exploring existing approaches rather than providing major conceptual innovations. It is probable that when Australian tourism researchers are identified they are usually associated with a kind of tourism interest rather than with the badge of conceptual innovation. In making this assertion there are some exceptions-, for example motivation and travel careers, mindfulness and interpretation, destination management models, and some economic assessments might be candidates- but a personal view is that like Australian food we are a fusion culture with little truly indigenous fare. This does not mean that there is nothing to offer but I think our place

in the global academic sun might be strengthened if there were more fundamental tourism ideas and if fewer nouns or verbs were put in front of the word tourism and that effort claimed as a mark of progress.

Preparing for the Future

The first wave of tourism researchers in Australia could be validly called pioneers. Like pioneers everywhere they have encountered some special difficulties and their experiences can usefully be passed to the second wave of research settlers. In advising ways to prepare for the future one particular difference between the pioneers and the settlers can be noted. The latter may be defined as predominantly Generation T – that is they have acquired one component of and sometimes all of their formal qualifications in tourism. There are some advantages and some limitation which Generation T scholars share and in considering the future of Australian tourism research these special generational characteristics matter.

The forces shaping Australian tourism research historically have not disappeared- the issues of career building and individual motivation, the concern with status, the dilemma of relevance and the knowledge management and the 'fusion' academic culture of Australia and its Asia Pacific context are all still with us. What is a little clearer perhaps for the settlers and the pioneers that are still with us, is that there are some steps and approaches which can partly address the problem areas and help individuals and organisations progress their causes.

Status, Respect and an Intellectual Core

The challenging issue of the respect for tourism study and tourism researchers is pivotal to the careers of researchers and to issues of funding within and beyond the Departments and institutions where they work. It can be suggested that a large part of the resolution to this issue lies in tourism researchers being able to articulate (and do so repeatedly and with conviction) the intellectual puzzles which lie at the heart of tourism study. Sociology has the central question of how is society possible, psychology seeks to develop the scientific study of behaviour, and anthropology asks how culture influences life and what question or orientation underpins tourism study? There are four contemporary directions in tourism study which can provide good answers to the questions of what are the main puzzles and problems in tourism. It is notable here that Generation

T researchers may struggle with these directions because of their more focussed education and approach to tourism analysis and thinking. Briefly, the four directions are:

1. **Tourism as a subset of human mobilities.** The questions here include how tourism is related to and what roles it plays with respect to other travel, to work and to non-work dimensions of life. We still need to identify some of the reasons why people are on the road, in the air and at sea and links to studies of leisure offer these directions.

2. **Tourism as a system within systems.** The questions here are how we can understand the hierarchies and panarchies in the systems which make both global tourism and local tourism function and change. What do we know and need to know about the interacting systems of influence which shape immediate and future tourism activity? Of particular relevance here is to ask the question the right way. By viewing tourism as part of a larger system we should not be asking what is sustainable tourism in itself but the subtly different and broader question how does tourism contribute to sustainable development. The connection to development generally and scholars of development is an important emerging bridge for tourism studies The question becomes how can we have a tourism sector which is a part of overall sustainable development on all of the relevant dimensions.

3. **Tourism as a life enhancing force.** The rise of positive psychology as an organised study area assessing happiness, human well being and a satisfying life has rapidly emerged in mainstream psychology. This study area is ideally suited as a link to tourist behaviour studies and will be a force for change in the consumer analysis literature. The focus here on the outcomes of tourism not just its presentation and management is appealing to many interests.

4. **Tourism and experience.** The concerns here are how to link tourism to the experience economy and how to move to the design not just the assessment of experience for visitors, business and communities. What are the defining principles to achieve excellent experience design in diverse tourism settings?

Tourism's Overarching Concern

Using these ideas as guiding resources we can propose a tentative answer to the question what is the overarching concern or question for a tourism researcher. The answer is "How do both the organisation of tourism

and the experience of tourists intersect with and relate to any topic under scrutiny?" This creates the study of tourism as a phenomenon centred specialism, forever probing connections and integration with the full richness of human and social conduct. One way to view this set of connections is to conceptualise tourists as the hidden nation; a group whose interests, impacts and structure are a part of any community and regional issue whether that be floods, fire, or famine and any dimension of development.

It can be noted that this is a broad view reaching beyond the perspective that tourism research is a useful business focussed discipline serving entrepreneurial activity [cf Gunn, 1994]. Tourism researchers adopting this expanded view of their sphere of interest should be at many roundtables of academic life and discussion not simply be underpaid occasional consultants. By seeing tourism studies as being connected to all sorts of social and human issues tourism's status and power as a study area can be enhanced. The view expressed here is aligned with that of Jafari [2005] and others who have suggested that tourism research which links to other disciplines and is abreast of the activities in those areas creates its own new adherents and generates respect.

Relevance, Application and Knowledge Diffusion

A special discovery of some import can be suggested to address the relevance issue and indeed beyond that the transfer of knowledge. The discovery is that individual research outputs are minor players in this conversation. As Crompton [2005] and others have noted individual research pieces are a small part of a large jigsaw and only overly enthusiastic graduate students think that their single study will revolutionise practice. Of greater interest is the cumulative knowledge, the state of play of that which is well established and which tourism academics have as their own tacit and external knowledge. This really means that tourism as an iterative, soft, dispersed, pre-paradigmatic subject area with a reflective style is more in the business of tourism extension and communication than the release of shattering or earth moving findings. There is in fact a curious rediscovery to this perspective. Extension was how tourism study started in the United States with Robert McIntosh's efforts at Michigan State University in the 1960s. Most major United States Universities continue to have extension staff as well as academic personnel (i.e. teaching and research staff). Australia when developing tourism study in the 1980s borrowed the impetus of US studies in tourism but forgot to borrow the allied personnel in extension.

One of the most important directions which can be taken for the future of Australian tourism research is a large campaign to develop extension officers in tourism. Many of our graduates would make good people for these roles. Agricultural extension in Australia is a large scale employment area- tourism extension is trivial by comparison but need not be so. State and local government bodies and industry associations are the logical places for the location of these new positions and CAUTHE could play a role in initiating this strategic investment in Australia's tourism research future.

The appeal to develop extension personnel is not to deny the roles of other groups where there are attempts to work collaboratively on mutually identified problems and to do this within a knowledge framework. Specific partnerships have their own usefulness but the serendipitous findings and applications of researchers who answer independently generated questions from within Australian and around the globe need to be added to the intellectual power of Australian tourism. In addition to the formal process of education the promise that extension holds is to be able to do this in the lifetimes of the current industry leaders.

Australia's Tourism Researchers – the Case for Fusion

There are parallels between Australia's geographic position and our academic style in tourism. There is a fusion of cultural styles of work with some Australians writing for more quantitative US journals such as The Journal of Travel Research and some developing contributions to UK and European traditions in interpretive and qualitative publications. I do not think it matters very much as to whether or not there is a distinctive Australian style of tourism research but instead what matters is that we do well what we choose to do. The processes of selecting from, contributing to and occasionally blending styles of work from Europe and North America should continue as creativity and innovation arise from such diversity of links. Necessarily, funding and familiarity will generate and maintain a focussed local quality to work in Australia built around Australian and Asia Pacific tourism activities. The only warning or caveat to a continuing local emphasis approach is that it is good to see the general in the specific, to develop the conceptual insights which cross borders rather than those which only serve a bounded area because only by adopting this wider view will the work remain of international interest and import.

In a moment of speculation we might anticipate some consequences from the ongoing Commonwealth government research assessment exercises and their imperatives. If the guidelines and approaches in other coun-

tries are at least a rough guide we cannot expect tourism research and researchers to fare very well. I am though prepared to adopt an optimistic view here- there is still a great deal that can be done with little funding as secondary data and internet resources provide enormous cheap and accessible riches for researchers. Further, research money which is closely tied to instrumental goals may actually not afford the opportunity for reflection and conceptual development and these areas may be where academic tourism researchers can be the continuing leaders for the broader world of consulting and government research. An optimistic attitude also suggests that we should not give up and through the national body which unites academics (viz. CAUTHE) we need to proselytise the cause of having tourism personnel on as many decision making bodies as possible. We need to do this armed with a view that tourism research is best viewed in the widest framework possible.

Like travel itself Australian tourism research has more places to go, more things to do and our sense of urgency and resources do not permit us to do them all. There are more studies to be done and activities to pursue than there are people to do the work so as fellow tourism research travellers we do not need to be fiercely competitive but we can be productively cooperative. One of the names I have received as the first Professor of Tourism is the Professor of Good Times – I do point out that it is other people's good times I study – but I have come to see that we need to enjoy the work and the very phenomenon of tourism to provide a sustained contribution. I look forward to the next 30 years of Australian tourism research and to further steps towards advancing our contribution to Australia and beyond.

International parallels to these Australian processes are undoubtedly to be found in many other tourism research generating locations. It is the challenge for all those who have held long serving positions in the growth of tourism study to document these paths and changes. Such qualitative appraisals can be supplemented by detailed bibliometric procedures and both reinforce each other in the documentation of the past. As Zimbardo and Boyd [2008] argue, the challenge for all of us in reviewing the past is not to be trapped by what has happened but to see the positive features of the previous eras and use them to build a brighter present while being concerned about but not dominated by the future.

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A Brief Outline of the Academic Achievements of Philip. L. Pearce and His Contribution to the Development of Tourism Research

Philip L. Pearce grew up in Adelaide, South Australia. He graduated with a 1st Class BA (Hons) in Psychology at the University of Adelaide, which was promptly followed by a Diploma of Education at the same University. His doctorate, completed in 1977 at the University of Oxford, UK, was based in Experimental Psychology and investigated the social and environmental perceptions of overseas tourists in Europe. The pathway of his career is drafted in his article published in this edition of Folia Turistica as it is intimately interwoven with the development of tourism research in Australia. After successfully defending his doctorate, Philip Pearce returned to Australia, teaching briefly at Flinders University before going to James Cook University to teach and publish in psychology and tourism studies. It was at this University where he was appointed the First Professor of Tourism in Australia. Prior to this appointment, he was a Director of the National Centre for Studies in Travel & Tourism and conducted a number of tourism consultancies.

He publishes widely in psychology and tourism studies journals, and his general research interests endeavour to gain a better understanding of tourist behaviour and experience. This specialist tourist behaviour research area provides a sound core to help understand tourism in general. His interests have developed in several ways. He focuses in part on why people participate in tourism and therefore conducts studies of tourist motivation. He has also developed an understanding of what tourists do on site (e.g. at theme parks, at museums, at attractions and in everyday tourist settings). Such studies consider tourists' emotional reactions, attitudes, behaviours and cross cultural travel experiences. Additionally, his interest in tourist behaviour extends to the consequences of tourists' actions. Here, there is a concern with tourists' satisfaction and learning as well as with the sustainability of what they do, including their impact on local people and places. These interests may be seen in part as encouraging everyone to celebrate, study and enjoy the fun of well managed tourism as a part of human flourishing and well being.

Professor Pearce is currently working on a numerous projects in themed areas such as: positive psychology and tourist behaviour (including studies of humour); backpackers and their development; Chinese outbound tourists, the design of experiences for visitors and tourism education. The result is that he is often involved with more than one study or writing endeavour in each area. His work is both carried out individually and with a number of academic colleagues and postgraduate (PhD)

students. The most accessible overview of his work is provided in the books *Tourist Behaviour Themes and Conceptual Schemes,* Clevedon: Channel View (2005), *Tourists Behaviour and the Contemporary World*, Bristol: Channel View (2011) and *Tourists Tourism and the Good Life,* Bristol: Channel View (2011), New York: Routledge. The latter is co-authored with Seb Filep and Glenn Ross.

He is currently supervising eight doctoral students on a wide range of topics varying from investigating diverse characteristics of tourism in Asia; tourism as inspiration for sustainable living; tourism vandalism at tourist sites, tourism experiences of Chinese travellers, work on tourist motivation and travel career patterns; and humour in guided tours.

Throughout his career so far Professor Pearce has gathered a number of awards and distinctions. Two pivotal early awards were his George Murray scholarship to Oxford University and a Fulbright scholarship to Harvard University. He is an Honorary Professor of Tourism at Xi'an International Studies University, China; a Foundation Member of the International Academy for the Study of Tourism, and an Invited Professor teaching courses at AILUN, Sardinia, Italy, IULM Milan, Italy, and Assumption University, Thailand. Through being faithful to his motto of excellence in teaching and research, he has been recognized by the Australian Learning and Teaching Council (ALTC) for his outstanding contribution to tourism education (2008). Professor Pearce has received and accepted invitations for key note presentations in Japan, Thailand, Korea, Israel, and on many occasions in Australia. In the 21st century alone he has been invited to the following conferences to provide a key note address: Australian Backpacker Industry Conference in Sydney 2009, CAUTHE (Australian University Tourism researchers conference) in Sydney 2007 and 2011, Asia Pacific Tourism Association in Korea 2006, Asian and South East Asian Institutes for Higher Learning (ASAIL) in Phuket, Thailand, 2005; ATLAS Backpacker Conference in Bangkok Thailand, 2005; Hospitality Education International Conference in Taiwan 2002, First Asia Pacific Conference on Graduate Studies in Tourism in Macau 2002 and X'ian International Studies University, 2001, 2006 and 2009.

Professor Pearce's travels in Asia, the United States and Europe continue to develop his professional understanding of tourism and tourists internationally. More locally he is involved as Chairman of the Judging Committee for the Tourism Awards, and as a speaker at local council and industry events. Internationally, apart from being an academic author in his own right, he has an esteemed reputation due to his many editorial commitments, for example serving as the Founding and Chief editor of the *Journal of Tourism Studies* (1990-2005) and Associate Editor for *Annals of Tourism Research, Journal of Teaching in Travel and Tourism, European Journal of Tourism* and *Asia Pacific Journal of Tourism Studies*.

Professor Pearce's contribution to improving our understanding of tourism is realised through his many works: he has authored and co-authored 11 books and monographs, over 100 journal articles, and 40 chapters in books as well as numerous reports, reviews and commentaries. He is not only a prolific writer; his work offers leadership and new directions for tourism researchers internationally.

(profile prepared by Dorota Ujma)

PART II

FROM THE WORK OF POLISH TOURISM RESEARCHERS

THE POLISH TOURIST ABROAD.
FROM STALINISM TO SCHENGEN AND WIZZ AIR

*Krzysztof Podemski**

Abstract: The article presents the evolution of international travel of former Eastern Bloc citizens, focusing on the example of Poland. International travel, including tourism, used to depend mostly on the current political situation. At the beginning of the 1950s, the Polish borders were almost completely closed. The process of opening the borders happened in tandem with a series of political crises; from the Poznań 1956 Protests and the relative opening up to the world in the 1970s, to the collapse of the communist system in 1989, the accession of Poland to the EU and the Schengen Agreement. For economic reasons, international tourism in the People's Republic of Poland included multi-purpose trips (trade and gainful activities). For a dozen years or so, Poland has been a part of the global tourist movement. Polish tourists are making up for lost time, but in spite of democratization processes, international tourism remains exclusive.

Keywords: Poland, communism, transition, border, passport, tourist, job migration, tourism and trade

Introduction

The opening article of this special edition of *Folia Turistica* on contemporary tourism, written by outstanding tourism sociologist Erik Cohen, begins with the following question:

> "Remember the camera-toting, cigar-chomping, gross American tourist, stumping the European hunting grounds half a century ago?"[1]

This is a false reflection of a Western, and particularly an American, tourist of the second half of the 20th century, and a metaphor for the cultural phenomenon of the new rich, who possess enough financial capital to set off on their round-the-world voyage, but not enough cultural capital to understand this world. Tourists arrive in a country with a low level of mate-

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     [1] Also: E. Cohen (2008), *The Changing Faces of Contemporary Tourism*, *Society*, vol. 45/4, p. 330.

rial well-being, which allows them to afford more than they could at home. They pay for comfort, quick transport, sightseeing, and isolation from the everyday life of natives.

However, this stereotype Cohen presents is not universal. Most certainly, it does not match the Central and Eastern European tourists of the 20th century. What would the image of a tourist from the Eastern bloc look like? Maybe an abashed-looking intellectual, straining under the burden of goods that they want to sell and food they have brought with them, enough for the whole stay? When they meet a fellow countryman in a crowd of strangers, they shout: "How much do I get for a bottle of vodka? A crystal vase? An amber necklace?" etc.

International tourism behind the "iron curtain" developed in a different way. Closed borders, a passport as a privilege, an unconvertible national currency, a black market for dollars, a ban on the import of Western press and books, a considerably lower living standard, few motorways and international airports, a state monopoly on industry – including tourism – are the most important factors contributing to the fact that international travel was a marginal phenomenon in socialist countries, significantly different from Western mass tourism. Crossing the border, particularly the "– East-West" border marked by the Berlin Wall, was stressful but magical. Getting to the "other" side was a quasi metaphysical phenomenon from the perspective of socialist state citizens who suddenly found themselves in an almost fairy-tale land of freedom and wealth. At the same time, in this colourful and rich world Eastern European citizens could acutely experience how poor they were. After crossing the border, they became beggars. Shops, restaurants, hotels, even petrol and public transport cost several times more than in their native countries. At the end of 1970s, you could travel all around Poland by train for the equivalent of a single London underground ticket; the average price of a meal in an average Western restaurant was enough to cover a whole month of meals in the Soviet Bloc.

Tourists from Eastern Europe observed this world through a glass window, but did not experience it. This world seemed fascinating, but exclusive, and therefore strange; at the same time, it was an object of desire and aspirations. Newcomers from the East used what was free or what they brought with them, they bought what was necessary and cheap. Some also bought goods they could sell at a profit, or picked up products unavailable in their home countries tied to their work or hobby, which enhanced their prestige when they arrived back home. This was the principal way that symbols of the counterculture, such as rock records and jeans, got to Poland in the 1970s.

* * *

According to UNWTO data, the number of "tourists" crossing the border of the country between 1950 and 2000 rose from 25 to 700 million (28 times). The number of Polish citizens leaving the country rose from 16,000 in 1954 (the first statistical data) to 57 million in 2000 (3,562 times greater!). If we only take into account tourist trips (lasting more than 24 hours; there were 19 million in 2000), there is still a increase of 1,200 times. The huge number of people leaving their country resulted from the closure of the onetime long-term border.

The social history of international tourism in Central and Eastern Europe has not yet been written. When it is, it will probably be a fascinating story about overcoming the political and economic barriers which separated people from each other and from the mythical "West."

The scope of this paper's topic is much narrower than this.[2] The purpose is to present changes related to Polish residents' journeys abroad over the last half-century. The biggest socialist state after the Soviet Union, Poland enjoyed the greatest freedom of travel to countries behind the "Iron Curtain" in the 1970s and 1980s. In the 1980s a lot of Poles passed the Berlin Wall with the feeling of *Schadenfreude*, aware that this border was closed for the residents of German Democratic Republic.

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[2] I should add I myself was a witness of and participant in these changes. My first foreign trip (at the age of 15, with my parents) was typical of the time, a one-day visit which did not require a passport, in the "borderlands" in Tatrzańska Łomnica and Smokowiec (Czechoslovakia). A memorable visit, as it was in August 1968, a week before the Warsaw Pact military intervention in this country. The first time I went abroad to the West was in 1975, after my third year of university. This was a student exchange between the Adam Mickiewicz University of Poznań, where I studied, and the University of Jyvaskyla (Finland). With a few dollars I had earned I went from Jyvaskala to Stockholm by ferry and spent a couple of days staying in one of the student halls, eating dry bread and drinking milk (from a Tetrapak™ paper carton, which was a great attraction for an Eastern European visitor like me – at home milk was non-pasteurized, delivered in dirty, heavy, glass bottles). After returning to Helsinki, the last night before going home, I spent on the street without a single dollar in my pocket. In the years that followed, except for the Martial Law period, I took every opportunity to travel around Europe, combining tourism with illegal work, like many people of my generation (as an MA and Ph.D. student I worked on a farm in Denmark, at a production line in the Netherlands, on building sites and in restaurants in the UK – one was situated in front of Harrods department store) and in trading electronic goods, fabrics, and clothes (as a young lecturer in the 1980s in Greece, West Berlin, India, Nepal, Thailand, Malaysia, and Singapore). I was questioned by the internal intelligence agency (SB) only twice. The first time was after coming back from Denmark in 1976, where I combined tourism with work. I still remember the absurdity of this investigation. (*Did you contact any spies? – No. – Are you sure? – Yes, I am. – Thank you then.*) The other investigation was n the middle of the 1980s, at the Polish-German border, when the East German customs officer, shouting "*Hal*t, *Halt*!" found a "forbidden" book, Jerzy Holzer's *Solidarity 1980-81: Origin and History*, printed by Institute Literacki in Paris, and confiscated it. After 1989 my travels were only tourist and/or academic in nature.

Closing Borders

In contrast to the Western European countries, the post-war tourist flow from (and into) Poland before 1989 was mostly determined by political factors. In the divided world, Poland ended up in a well guarded bloc. Arrivals of foreigners were strictly monitored, but Polish citizens leaving their country were monitored even more strictly. When they applied for a trip, collected their passport, and crossed the border, Poles were always monitored by the state's apparatus of repression. A passport became a privilege, likely to be lost by those who ostentatiously manifested their hostility toward the political system.

However, Polish borders were not closed right after the end of World War II. The first post-war years were a period of great migration, most often compulsory and related to territorial changes. This transboundary movement of people on Polish territory between 1945-1949 involved over ten million citizens. The historical necessity of post-war migrations made it impossible to close the borders. A symbolic moment of change was the introduction of the Passport Act on 7 April, 1949, which radically changed the pre-war, liberal act. Enacting the Passport Act was a facet of more wide-reaching changes: the radical limitation of civil liberties, and the elimination of the remains of political pluralism and the free market.

Due to the extreme repression and total subordination to the Soviet Union, the 1948-56 period is called "Polish Stalinism." The close of the borders in 1949 was also a result of decisions made in the Kremlin. This isolation enabled full control of the labour force and army recruits, and was a result of the Cold War. It is worth mentioning that the tradition of isolation in Russia had started back in the tsarist era.

In the Stalinist period even having family abroad inspired government distrust, and could be used as a pretext for repressive action. According to a historian of migration, "The first half of the 1950s can be considered the period with the lowest level of international mobility in several hundred years" [Stola, 2001, p. 24].

The borders between the Eastern Bloc and the rest of the world were also economic. The political division between "socialist states" and "the other" covered (with the exception of Yugoslavia) the division between "payment zones" I and II, that is, countries with unconvertible currencies, and those with convertible currencies, such as pounds, dollars, or marks. The economy of the Eastern Bloc, which a Hungarian economist has called a "shortage economy" [Kornai, 1985], led to a dollar shortage and black market in some of the bloc countries. Even the possession of foreign currency was penalized during Stalinism; it was supposed to be returned to the state. As a result, earnings in the local currency which were enough to get by in one's home

country, were of little value after conversion into dollars, which made it impossible to make a living. In 1960 the average salary in Poland, according to the black market currency rate of exchange was seventeen US dollars, and in 1989, twenty-eight dollars.

Only in the two-year period of 1979-1980 was the average salary in Poland over forty dollars. It is worth mentioning that the real "tourist" value of the Polish salary was dropping systematically, because in Western Europe you could buy less in 1989 for twenty-eight dollars than you could thirty years earlier for seventeen dollars.

Stages of "Opening" the Border

In comparison to changes concerning transport techniques, work, and leisure time, as well as the organization or standard of life, the political division of Europe had a more visible impact on Polish tourist movement. Stages in the development of international tourism to and from Poland were determined by subsequent political turning points: 1956, 1970, 1980-1981, 1989/1990.

The first statistical data available is from 1954. That year 16,323 Polish citizens left the country. Destinations included 2116 non-socialist states. Private, non-business trips were marginal (13% to "socialist states" and 2.5% to non-socialist states). The following year it was as many as 44,163 people who left. The liberalization process started in 1955, when organized tours to the Soviet Union became simpler. The only travel agency that organized foreign travel at the time was "Orbis," set up before the war. In the following years some other social, youth, and sport organizations acquired the right to sell such trips.

The first stage of a relative "opening" was initiated by the **Polish October 1956 – a political turning point which was a consequence of "VIII Plenum" meeting of the Central Committee of the PZPR** (Polish United Workers' Party). This year 256,000 Polish citizens were registered to leave (including 17,000 participants of organized trips, mostly to Czechoslovakia, East Germany, and Bulgaria), and 78,000 to arrive in Poland. Subsequently, until the 1960s, every year several hundred thousand Polish citizens left the country (the most in 1966: 958,000). Although travel to other socialist states was dominant, the share of other countries rose to 20 per cent at the time. Obviously, it was usually the elite who went abroad, particularly to the Western countries. Polish historian Marcin Kula wrote:

> "After 1956 Polish academics went abroad in relatively large numbers (…) more frequently than many other professional groups (…), and more numerously than citizens of other socialist states (even the Soviet Union), not to mention

Table 1. Number of international departures made by Poles between 1955-1988

Year	Total number of departures	Compared to preceding year	Only to non-socialist states	Compared to preceding year	Share of departures to non-socialist states in total
1954	16 323	–	2 116	–	15%
1955	44 163	270%	No data	–	–
1956	256 702	581%	13 993	–	5%
1957	236 274	92%	59 004	422%	25%
1958	163 826	69%	46 329	79%	28%
1959	193 701	118%	42 356	91%	22%
1960	216 440	112%	41 382	98%	19%
1961	371 852	172%	43 605	105%	12%
1962	446 451	120%	51 061	117%	11%
1963	385 754	86%	53 655	105%	7%
1964	577 309	150%	71 488	133%	12%
1965	778 442	135%	75 712	106%	10%
1966	948 993	122%	90 742	120%	10%
1967	930 429	98%	96 631	106%	10%
1968	728 086	78%	92 376	96%	13%
1969	814 440	112%	108 304	117%	13%
1970	871 347	106%	114 133	106%	13%
1971	1 072 403	123%	156 856	137%	15%
1972	10 602 645	989%	208 454	133%	2%
1973	7 590 292	72%	259 400	124%	3%
1974	8 288 227	109%	279 677	108%	3%
1975	8 152 899	98%	316 016	113%	4%
1976	10 182 759	125%	401 548	127%	4%
1977	11 900 773	117%	517 944	129%	4%
1978	10 640 396	89%	576 748	111%	5%
1979	9 431 049	89%	601 478	104%	6%
1980	6 852 103	73%	695 083	156%	10%
1981	4 232 349	62%	1 247 961	180%	16%
1982	995 337	24%	316 738	25%	32%
1983	1 751 614	175%	456 338	144%	26%
1984	3 288 824	188%	738 678	162%	22%
1985	3 493 472	106%	826 649	112%	24%
1986	4 313 334	125%	956 781	116%	22%
1987	5 229 524	121%	1 130 150	118%	22%
1988	6 923 503	132%	1 664 519	147%	24%

Source: Podemski [2004] (own findings based on GUS and Orbis data).

East Germany or Cuba. (…) It was not only a tiny group that stayed 'closer to Paris than Moscow.' Incidentally, those working in the exact and natural sciences fared even better than humanists." [Kula, 2010, p. 36].

Scientific expeditions were inseparable from tourism, city sightseeing, and visiting museums. However, we should remember that a passport was given to an applicant for every single departure and it could be revoked at any time – for instance, for prolonging a stay without permission, or "untrustworthy" contacts abroad.

Apart from the relative "opening of the border" for the Polish elite, particularly academics, there were other exceptions from the rule. The passenger ship "MS Batory" was a singular phenomena. Between 1947-69 it sailed all over the globe; one of its cruises – from France to The Soviet Union – was even described by Roland Barthes in his *Mythologies* (first French edition 1957).

The appetite for travel was growing, but actual opportunities were still very limited. In 1957, the popular *Przekrój* magazine published fake tourist suitcase stickers (from London, Casablanca, and Rimini), popular in the West at the time.

> "Obviously, our chances of traveling abroad, even including business travel, are remote. Far better than before October 1956, but still faint. (…) Therefore, we give you (…) what we have: hotel and airport stickers (…) At least your suitcase won't look so sad on the Tarnów-Bydgoszcz route." [Jaworska, 2008, p. 2006].

Up to the 1970s, the number of foreign visitors and Poles journeying abroad increased very slowly. Furthermore, in the 1960s Poles went abroad more rarely than Czechs and Hungarians. In record-breaking 1966, 948,000 Poles left their country, in comparison to 1, 964,000 Czechs and Slovaks and 953,000 Hungarians. In the mid 1960s the departure rate calculated by the number of citizens was only 4% for Poland in comparison to 9.5% for Hungary and 14% for Czechoslovakia.

The political and economic situation of the 1960s and the early 1970s shaped a very specific structure of departures. For example, in 1967, 833,000 of 930,000 international tours destinations were to other socialist states. Most citizens went to Czechoslovakia and East Germany (204,000 each), the Soviet Union (185,000), Hungary (108,000), Bulgaria (78,000), Yugoslavia (33,000), and Romania (20,000). There were only 96,000 documented tours to non-socialist countries, mostly to France (17,000), the UK (14,000), Scandinavia (12,000), West Germany (11,000), Italy and Austria (7,000 each), the Benelux (5,000) and the USA (4,000).

The second "opening stage" of the Polish borders was in 1972. Due to new regulations, which allowed travel to East Germany without a passport, the number of international tours increased by ten times (from 1.07 to 10.6 million) during a year. However, 90% of these were to East Germany. Also, very soon it was possible to travel to the countries outside Comecon and Warsaw Pact without an official invitation from a citizen of the country of destination (necessary till then). As a result, from 1971-1977 the number of departures to these countries increased by over three times. After 1977 travel was allowed to other socialist states without a passport. Only a special stamp in the traveller's identity card was necessary (Figure 1).
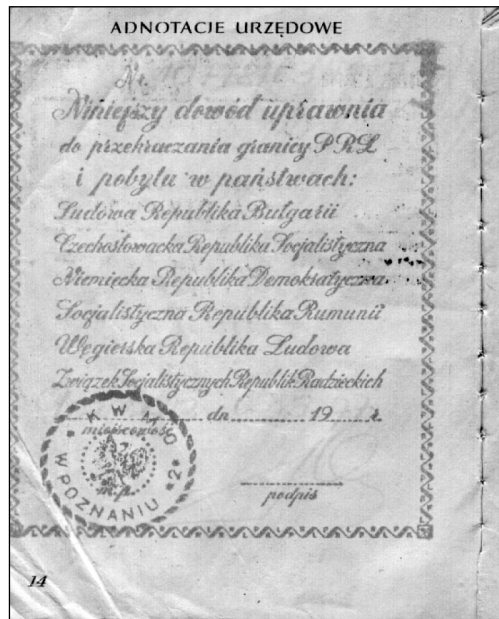
Figure 1. Stamps in an identity card which, from 1977, allowed travel to Bulgaria, Czechoslovakia, East Germany, Romania, Hungary, and The Soviet Union

Subsequently, Poles travelled abroad in significantly larger numbers than Hungarians, Czechs, or Slovaks – including to non-socialist states. In 1977 the number of destinations called "other" at the time exceeded 500,000. This relative "opening of the border" by a non-democratic state with inconvertible currency and a shortage economy demanded bureaucratic travel regulations from the state authorities. The ten-year transition period between the closed border blockade and full border-crossing freedom overflowed with such legal regulations as: "passport inserts," "foreign

currency book" (registering all currency purchases), "identity card exit stamp," "100-US-dollar (130-dollar) rations," "invitations" "foreign currency accounts," "promises," and "deposited passports."

These bureaucratic inventions, which enabled the opening of the borders, simultaneously helped to monitor who was crossing them; they were part of the "generational experience" for those who snapped up the opportunity to leave the country in the 1970s. The relative "opening of the border" was also accompanied by a slow opening to Western ideas and technologies. A symbol of such an opening was a campaign led by *Polityka* magazine, called "Learn, Even from the Devil." The authors of a popular guidebook, "Europe for 100 US Dollars," presented a new opportunity to buy foreign currency for the official price (much lower than the black market price) in the following way:

> Everyone can receive a $100 ration. To do so, you have to fill in the application and send it to the Physical Education and Tourism Voivodeship Committee through authorized travel agencies, or directly to social organizations dispensing foreign currency. These are: ZBOWiD (Polish Combatant Association), The Literary Association, The National Union of Journalists, and the Polish Students Socialist Association. Once you receive an affirmative answer, you should make a down payment of 50% of the value of the currency within 90 days. A failure to pay will result in withdrawal. The remaining sum should be paid upon collecting the currency, that is, upon receiving a passport. Confirmation of receipt (300 zł) should be shown to a border guard, who confirms the export of the currency. The border guard's stamp is necessary. Without the stamp, the foreign currency must be returned. You can apply for foreign currency every three years – for journeys to Yugoslavia or capitalist states. [Torańska, Górkot, 1977, p. 12].

The 100 US dollars mentioned, calculated according to the black market rate of exchange, was equal to three average months' salaries. That is why every citizen who bought their ration but did not leave was obliged to return it. At the end of the decade, the ration increased to 130 USD. Another way to get a passport to leave abroad was to receive a consulate-authorized invitation, in which the person writing the invitation committed him/herself to cover the costs of the visit, and of the possible medical care of the person invited.

In the middle of the 1970s, trips to Western Europe were not mass in number, but they were also no longer a privilege of the social elite (civil servants, artists, scientists, and sportspersons), or those who had relatives abroad. It was particularly students who seized the new opportunity. In the period of the "Solidarity" movement, neighbouring countries closed their borders to Polish tourists, as they were afraid of spreading the "revolution."

As a result of this and of internal liberalization, the number of trips to Western Europe in 1981 was record-breaking (over 1.2 million trips, a 100% increase in comparison to the previous year). The "border opening" process was stopped by the introduction of Martial Law in Poland in December 1981. this was not for long, however, as in 1983 the number of trips to non-socialist states approached half a million; that is, it reached the level of the latter half of the 1970s.
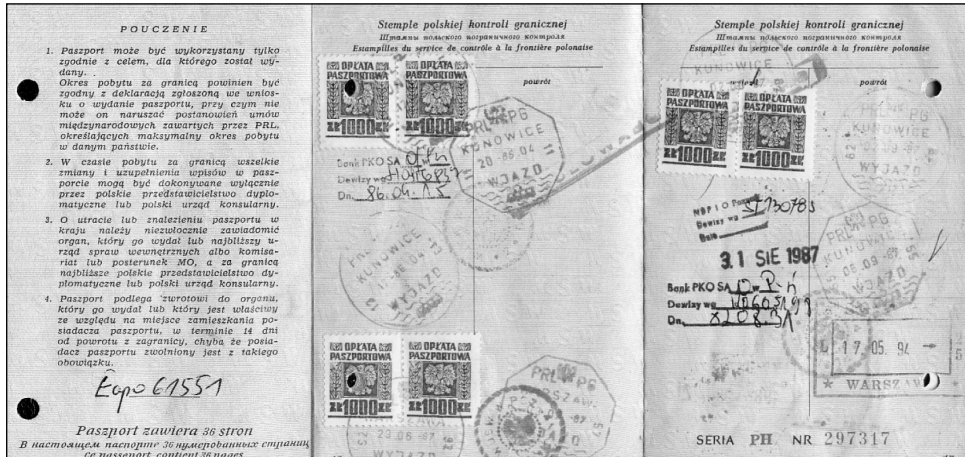
Figure 2. An "admonition" in a Polish passport from the 1980s that it should be used "appropriately" (that is, to arrive at the declared country of destination and to leave at the declared time of departure) and to return it 14 days after coming back; and obligatory passport fee, border stamps, and bank entries indicating foreign currency delivery

The burdensome life in socialist Poland and the difficulties in going abroad caused some tourists not to return and to choose emigration. The number of emigrants fluctuated every year. In 1960 there were 322 registered cases of tourists who refused to return with their tour. In 1982, 6% of tourists did not return from their tours [Stola, 2010].

Polish tours were unique in being **multi-functional**, combining tourism with **gainful employment**. A significant number of the tours made by Poles, particularly to the "payment zone" II (that is, to countries in which the Polish zloty was not a convertible currency) aimed to get a job, either legally (through "contracts") or illegally. Poles usually worked legally in the "befriended" countries of Libya or Iraq, and illegally in UK, France, Germany, or Sweden – in restaurants, building sites, plantations, or factories. The first official signs of Polish tourists travelling to the Soviet Union and trading goods came in 1956. Probably most tourists going abroad in the

1960s, 1970s and 1980s temporarily adopted the role of "exporter" and "importer." It was an open secret that it was profitable to carry terry cloths to Hungary, medicine to Romania, and amber, cigarettes, and vodka to the Western European countries. More experienced tourists carried crystals and "Zenith" cameras (brought from the Soviet Union) to India, and imported cheap, cotton, "hippie" clothes. Children's clothes were imported in large quantities from Eastern Germany (particularly those worn by children born in the 1980s), sheepskin coats from Turkey, and in the 1980s, electronic goods from West Berlin and Singapore. Importing was performed both by individual tourists and participants in organized trips, no matter what the destination. The destination determined only what kinds of goods were imported and exported. In these times of the "shortage economy" [Kornai, 1985], international tours also made it possible to buy products which were unavailable in one's home country. Marcin Kula lists products brought from scientific trips to Paris between 1947-1974: men's, women's, and children's clothing, glasses and sunglasses, camera plates, radios, watches, foodstuffs (particularly bananas, chocolate, and coffee), stationery (including typewriter paper and carbon ribbon, necessary for academic work), medicine, household products, and cosmetics. As the Polish zloty was non-convertible, even during the "100-dollar ration" period, such trade was usually necessary for the tour to come about. In many cases, tourism was a way to survive the crisis into which the planned economy was plunging.

The chance to gain financial profit from tourism resulted in an expansion of the number of Poles' tourist destinations in the 1970s. In 1979 the most popular international trips with destinations in non-socialist states were: West Germany (130,000 trips, as well as 10,000 to West Berlin, which the official statistics treated as a separate state), Italy (60,000), France (55,000), Austria (51,000), the USA (41,000), Sweden (36,000), the UK (34,000), Greece (28,000), Turkey (26,000), Denmark (17,000), Holland (13,000), Belgium (10,000), Libya (9,000), Iraq and Spain (8,000 each), and Finland and Canada (7,000 each).

The political and economic transition following 1989 resulted in the third stage of mass tourism. Since then, every year the number of trips has no longer been six-digit (as in the 1960s) or seven-digit (as in the 1970s and 1980s), but eight-digit. From the "tourist's" point of view, the most important changes have been democratization and the opening toward the neighbouring countries, the realignment of dollar, and the fact that passports, previously kept in the Interior Minister's drawer, were given to citizens.

Interestingly enough, it was the last communist government of Mieczysław Rakowski which introduced a fundamental change in 1988. At the time:

citizens were given – for the first time in half a century – the right to possess a long-term passport, valid for all the countries of the world and entitling the holder to cross external borders, which did not have to be returned to the government office, but could be kept at home. [Stola, 2010, p. 35].

As a result, in 1989 the number of international trips increased by almost three times in comparison to the previous year – up to 19.3 million. In the following years (with the exception of 1991, when there was a drop), the number of trips increased by several million every year, up to the record-breaking year 2000 when it was almost 57 million. Between 2001 (53 million trips) and 2004 (37 million trips) the number of trips decreased. In the following years it stabilized to a level of 40-50 million a year. What had an extremely important influence on the increase of trips, and particularly tourist trips, was the realignment of dollar, the elimination of the foreign currency black market, and gradual salary increases. At the beginning of the 1990s the average Polish salary went beyond 100 US dollars for the first time. At the end of the decade it was 300 US dollars, and at the moment it equals around 800 US dollars.

The political transition also resulted in an increased number of arrivals to Poland. In 1989, 8 million people visited our country, and the following year, 18 million. The number of visitors increased up to the record-breaking 1999, when 89 million foreign visitors crossed Polish borders. Most of these visits were business-related.

Finally, the last stage of the popularization of international trips was Poland's accession to the European Union (1 May 2004), the elimination of passport checks at the southern and western borders after joining the Schengen area (21 December 2007), and the availability of low-cost airlines. Not only have these facts caused the number of trips to increase, they have also changed their structure. First of all, more and more people are travelling by plane. Secondly, despite

Table 2. International trips from Poland, between 1994-2008, by borders (in thousands and %)

BORDERS	1994		1997		2000		2003		2005		2008	
WESTERN	19 550	57%	20 782	43%	21 463	38%	12 657	33%	13 639	34%	17 646	36%
SOUTHERN	11 565	34%	23 522	48%	30 400	53%	20 429	53%	17 512	43%	18 833	37%
EASTERN	2 437	7%	2 752	6%	1 837	3%	3 180	8%	6 434	16%	7 248	14%
SEA	193	1%	677	1%	1 718	3%	1 093	3%	483	1%	510	1%
AIRPORTS	551	1%	758	2%	1 259	2%	1 371	3%	2 772	7%	6 006	12%
Total	34 296	100%	48 610	100%	56 677	100%	38 730	100%	40 841	100%	50 243	100%

Source: Own findings, based on data from the Institute of Tourism.

the Schengen Agreement, which makes it complicated to cross the eastern border (apart from the Poland-Lithuania border), the number of border-crossings has increased (on the other hand, this increase might have been caused by more accurate record-taking). Freedom of travel around Europe has resulted in a decreasing number of people who declare the possession of a passport (from 50% in 2001 to 39% in 2009).

According to the statistics of the Institute of Tourism, only 15-20% of departures last longer than 24 hours, that is, only 15-20% of departures are "tourist trips" according to the definition of United Nations World Tourism Organisation. The greatest number (10 million) of such trips was registered in 2000. This means that the vast majority of Polish journeys are one-day tours to neighbouring countries, mostly shopping-oriented.

Taking the Opportunity to Travel

Freedom to travel has for years been regarded as one of the greatest achievements of the political transition. An "anniversary" survey conducted by the Public Opinion Research Centre CBOS on the 20th anniversary of the political transition showed that 21% of respondents, when asked about changes for the better, mentioned the freedom to travel (just after "full shelves" – 25%).

Thus, how much do the Poles know about foreign countries 20 years after Poland was opened to the world?

Starting in 1993, CBOS has asked the same question every few years: *Have you ever been abroad?* The first survey showed that at the beginning of political transition, only 49% of Poles had been abroad. This number in-

Table 3. Number of international trips

Number of international trips	1993	1997	2001	2004	2006	2009
Never abroad	51%	44%	39%	39%	39%	34%
Have been abroad but not in the last 20 years	2%	2%	2%	3%	1%	2%
Once in the last 20 years	–	12%	11%	10%	11%	13%
2–3 times in the last 20 years	–	14%	16%	15%	18%	16%
4–7 times in the last 20 years	–	12%	15%	14%	14%	13%
8–12 times in the last 20 years	–	6%	5%	6%	6%	9%
13–20 times in the last 20 years	–	4%	5%	4%	5%	3%
21 times and more in the last 20 years	–	4%	6%	7%	5%	7%
Don't remember, hard to say	–	2%	1%	2%	1%	2%

Source: Own findings based on the data of CBOS.

creased to 56% in 1997 and in 2001, and in 2004 and 2006 "stabilized" at 61%. According to the latest survey (2009), it is now at 66%. One in three Polish residents has been abroad no more than three times.

Thus, the number of Polish residents who have never been abroad decreased from 51% to 34% between 1993-2009, but it was still greater than in the countries of the "Old Europe." In comparison, according to the research conducted in the UK in 1991, only 16% of British citizens claimed they had never been abroad [Jacobs, Worcester, 1991]. Probably in the European countries in which borders can be crossed more easily, this number is even smaller. According to the Eurobarometer survey of 2007 [EB, 2007 – *European Cultural Values*, Special Eurobarometer 278/Wave 67 – TNS Opinion & Social, September 2007, European Commission], 16% of Poles had been abroad at least three times "for leisure or business" in the past three years, while the average for the 27 European Union members was 27%. were those who travelled the most frequently (65%), before Luxembourgers (63%) and Danes (56%). Bulgarians (5%), Romanians and the Portuguese (8% each), and the Spanish and Italians (12% each) travelled less frequently [EB, 2007]. One in four Polish residents knows only one foreign country, and 50% know only three.

Polish citizens travelled mostly to the neighbouring countries, which is not a rule in Europe. One in three Poles went to Germany, one in five to Czech Republic and Slovakia. Trips to eastern neighbours are considerably less popular. In 2009 few respondents claimed that in the previous 20 years they had been to Ukraine (6%), Russia (3%), Latvia (3%), or Belarus (1%). As you can see, the destinations correspond with Poland's political "shift" from the East to the West.

The most visited countries, apart from Poland's neighbours, were Italy (12%), Austria (10%), France (9%), the UK and Hungary (7% each), Spain and the Netherlands (6% each), and Greece (5%). Of the non-European countries, the most popular were Turkey (3%), the USA and Egypt (2% each), and Tunisia and Israel (1% each).

Poles' travel destinations differ significantly from those of the "Old Europe's" residents. They also usually spend their holidays in Europe, but mostly in France and Spain (19% and 24% respectively of EU residents in 1997 and 1998).

According to the 2010 Eurobarometer survey [EB, 2010 – *Survey on the Attitudes of Europeans toward Tourism*, Flash Eurobarometer 291, The Gallup Organisation, March 2010, European Commission], 61% of Poles who had gone on holiday claimed they had spent it in their home country (EU average 48%), 20% in another EU country (EU average 29%), and 12% outside the EU (EU average 19%). At the same time, 53% of Poles who planned a holiday trip in 2010 said they would spend it in their home

Table 4. Familiarity with foreign countries

Number of countries visited in the past 20 years	1993	1997	2001	2004	2006	2009
Never abroad	51%	44%	39%	39%	39%	34%
Have been abroad but not in the past 20 years	2%	2%	2%	3%	1%	2%
One country	19%	18%	22%	18%	21%	22%
Two countries	9%	13%	12%	11%	13%	12%
Three countries	5%	8%	8%	10%	9%	10%
Four countries	6%	3%	4%	7%	4%	7%
Five countries	3%	3%	4%	3%	3%	4%
Six or more countries	4%	7%	8%	8%	7%	9%
Many, don't remember the exact number	1%	2%	1%	2%	2%	0%
Most often visited countries						
1993 Germany (33%) Czechoslovakia (19%) the Soviet Union (13%) Hungary (12%)	**1997** Germany (33%) Czech Rep. (14%) Hungary (14%) Czechoslovakia *) (11%)	**2001** Germany (38%) Czech Rep. (16%) Slovakia (10%) Italy (10%)	**2004** Germany (34%) Czech Rep. (20%) Slovakia (14%) Hungary (11%)	**2006** Germany (33%) Czech Rep. (20%) Slovakia (13%) Italy (12%)	**2009** Germany (36%) Czech Rep. (21%) Slovakia (16%) Italy (12%) Austria (10%)

*) On 1 January 1993, Czechoslovakia peacefully split into the Czech Republic and Slovakia, respondents in 1997 used both names.

Source: own findings, based on the data from CBOS.

country (EU average 41%, least frequently the Norwegians – 14%, and most frequently the Spanish – 64%), 15% said they were going to spend it in another EU country (EU average 23%, most frequently residents of Malta, Luxembourg, Belgium, and Ireland). Only very few Polish residents were going to spend holidays outside Europe: 2% in Africa (EU average- 3%), 1% in North America (EU average 3%), and 0.5% in Asia and South America (EU average 3%).

Travel Purposes

For over a decade there have been important changes concerning travel purposes. According to CBOS surveys, respondents declare tourism (1997 – 34%, 2009 – 65%), work abroad (1997 – 12%, 2009 – 22%), rest and treatment (1997 – 9%, 2009 – 17%). The frequency of other purposes have not

changed: shopping and trade (1997 – 15%, 2009 – 14%), VFR (1997 – 13%, 2009 – 15%), business (1997 – 4%, 2009 – 5%), studies, education, and foreign language practice (1997 and 2009 – 2%).

In the first decade of the 21st century, on average, one in ten Poles spent their holidays abroad. The most people (14%) declared it in 2008, the fewest in 2005 (7%). In both 1997 and 2009, 11% of the respondents said they had worked abroad. According to the last survey, almost half of the people who worked abroad in the past 10 years stayed in Germany, one in six in the UK, one in ten in Italy, the Netherlands and France; more rarely in the USA, Spain, Ireland, Austria, and Norway. According to estimates, about 2 million Poles emigrated after 2004, mostly to the UK, Ireland, and Germany.

Social Differences

Although the political and formal barriers which made it difficult to travel have disappeared, the extent to which the opportunity to explore the world is utilized is very diverse. Factors differentiating familiarity with foreign countries remained unchanged between 1993-2009. The most important factor is **education**. The differences between people with university and vocational educations are vast here. International trips are common for people with a higher level of education. Only 9% in 1993 and 3% in 2009 claimed they had never been abroad. In comparison, in 1993 as many as 63% of people with vocational education had never been abroad (57% w 2009). Another important factor is **place of residence**. Up to 2009, one in four residents of urban areas had never been abroad in comparison to the half of the residents of rural areas. However, comparing data from 1993 and 2003, we can see that the number of rural-area and small-town residents who have been abroad has increased, because in 1993 as many as two-thirds of rural area residents and 56% of town and small-town residents had never been abroad.

Such an increase has been a result of the most recent wave of job migration. International trips are also **differentiated by region**. Until 1993, it was the residents of western, southern and northern Poland who had been abroad the most often; the residents of central and eastern Poland the least frequently. A survey from 2009 shows an increasing polarization. Those who claimed they had been abroad the most often were from the western provinces and the least often from the east; residents of the other provinces fit the average for the whole population. Residents of central Poland went abroad significantly more often than before. This means that the decision to leave is less determined by distance from the country's borders than by regional wealth. In 2009 only 18% of Lower Silesia and Upper Silesia and 23% of the Lu-

busz Land and Western Pomerania (western regions) had never been abroad, in comparison to 47% of northeast Lesser Poland and the Świętokrzyskie Voivodeship and 41% of Podlachia residents (eastern regions). Finally, familiarity with foreign countries is determined by **wealth**. One in two Poles who considered their financial situation to be good had been abroad more than three times, in comparison to one in three Poles who considered it bad.

Conclusion

Polish people who wanted to travel in the period of the socialist state had to overcome numerous difficulties. First of all, they had to get documents which entitled them to travel. In the Stalinist period (1948-55) it was almost impossible to obtain a passport. After the political breaking point in 1956, the liberalization of the passport policy evolved slowly, and in fits and starts. It lasted thirty-two years, until the end of the socialist state. The stages leading to establishing the right to possess a passport were: permission to travel to socialist states (especially to border towns) on the basis of more readily available documents (for example, identity cards) and a relaxing of the regulations on issuing passports. Secondly, it was almost impossible to get by on a Polish salary in western countries. To cross the border of the Eastern Bloc, one had to have the support either of a national or international institution or family abroad, or to find a job (usually illegally) during the trip. Travellers had to live frugally, avoiding hotels (staying over with friends or family, hostels etc.) and restaurants and preparing food on their own from products bought at discount shops, and most often, from things brought from Poland (like tins and instant soups). Although throughout all this period the average Polish salary equalled about 30 US dollars, new regulations in the 1970s, allowed the purchase of 100 US dollars every 3 years at the government rate, making the financial barrier less noticeable. As a result, Polish tourists were not tourists in an economic sense, that is, they spent very little money or no money at all in the destination country. On the other hand, working, trading, staying with families and friends, a little bit like backpackers, they often had the opportunity to get to know everyday life of foreigners better than travellers from the West who went on organized tours. By the way, tourists have constituted a very small and the most elitist part of those who have experienced the possibility to travel.

After 1989, there was a substantial rise of the number of international trips. Many are still one-day, shopping-oriented visits in borderland regions or job migration (now mostly legal). At the same time, due to sys-

tematic decrease of the salary discrepancies between Poland and Western Europe, more and more Poles travel abroad for strictly tourist purposes, and participate in the global tourist movement, also due to international tour operators such as TUI or Neckermann. Although Poles choose rather affordable destinations (Egypt, Tunisia, Turkey) or more traditional ones (Italy, Greece) and inexpensive hotels (mostly 3-star), trips to exotic countries, such as India, China, Kenya, and Cuba, are increasingly popular. Poles travel less frequently to the former bloc countries, particularly Bulgaria and Romania, which used to be very popular. My own observations, combined with the research in international travel guides [Podemski, 2005], show that Poles who travel are more sightseeing-oriented than tourists from Western Europe (e.g. they buy "optional" sightseeing trips in Egypt, to Giza or Luxor), and they less often focus on pure leisure, such as basking at the swimming pool. It seems that they are trying to make up for lost "tourist" time.

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TOURISM PROMOTION, DISCOURSE AND IDENTITY

*Sabina Owsianowska**

Abstract: The role of the critical analysis of discourse in studies on tourism is related to the fact that communication, usually of an intercultural nature, is the essence of the act of tourism. Nevertheless, although the problem of significance has been an important issue from the very beginning as part of the humanist reflection on travelling, systematic studies of discourse in tourism were initiated relatively late. Observations of the relationship between images of other cultures and people and experiences in places visited begs the question of the role of discourse in shaping identity: hosts, travellers, and places. Based on the analyzed image campaign, one might see attempts to show tensions between the different discursive projects of the identities of people who visit and live in Poland, and the identity of the space in which their encounters are held. To achieve the desired goal, a whole gamut of traditional and modern means of expression and a more or less sophisticated game with the symbols and meanings of Polishness has been used as part of its promotion. The ambiguity of interpretation arises not only from peculiarity and originality of the analyzed messages. It is an expression of the search for new discourses and identities in an era of globalization, mediatization, and universal mobility.

Key words: discourse, new media, promotion, semiotics, identity.

Introduction

An increased interest in discourse in the humanities and social sciences dates back to the 1980s. Understood as a social action and a semiotic system, discourse is influenced by ideology; it is the source of symbolic power and reflects the asymmetry of relationships in social interactions. It concerns language in use, and it is analyzed both as a tool for constructing reality and as the record of the processes occurring in it [see Fairclough, Duszak, 2008, pp. 7-29; van Dijk, ed., 2001; Foucault, 1977]. Deconstruction of discourse thus creates the opportunity for emancipation through unveiling structures of thinking, questioning their basis, and re-reading of meanings, which often appear in completely new, and sometimes surprising contexts. A glo-

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balizing world requires more and more semiotic and linguistic reflexivity, a "metapragmatic awareness of language users," and taking into account the peculiarities of local contexts and practices [Jaworski, Thurlow, 2010; Blommaert, 2005].

The role of the critical analysis of discourse in studies on tourism is related to the fact that communication, usually of an intercultural nature, is the essence of the act of tourism. Nevertheless, although the question of meaning has been an important issue as part of the humanist reflection on travelling from the very beginning [MacCannell, 2002], systematic studies on discourse in tourism were initiated relatively late. On the one hand, this was caused by the marginalization of tourism as a subject of research by representatives of more established disciplines; on the other, studies themselves on this phenomenon were dominated by an approach associated with business and the positivist paradigm [Franklin, Crang, 2001; Phillimore, Goodson, 2004; Tribe, 2005; Alejziak, 2008]. Observations of the relationship between images of other cultures and people and experiences in places visited begs the question of the discursive projects of the identities of people who live in Poland or visit the country, and the identity of the space in which their encounters are held [on identity and tourism see Bruner, 1991; Lanfant, Allcock, Bruner, 1995; Giddens, 2001; Mamzer, 2003; Edensor, 2004; Jaworski, Thurlow, 2004; Hallet, Kaplan-Weinger, 2010 etc.]. Tourism can be viewed as "an identity resource for members of post-industrial, late-modern societies" [Jaworski, Thurlow, 2004, p. 297; see also: Wodak et al., 2003; Golka, 2010]. The tourist experience embraces different "encounters" or "clashes" of a tourist's identity and the identity of a place and its inhabitants [Govers, Go, 2004]. The discourse of tourism is thus seen as one "of identity construction, promotion, recognition, and acceptance":

> It is a discourse created through the creation and manipulation of linguistic and visual texts. […] **they share common goals that become transparent through the work of discourse analysis**. Those goals involve both producer and audience, both self and Other, for no one is exempt from the effects of discourse [Hallet, Kaplan-Weinger, 2010, p. 11; my emphasis – SO].

Tourism is regarded as a discourse, a rhetoric or a narrative by various authors [i.e. Dann, 1996; Hollinshead, 2004; Santos et al, 2008; Feighery, 2006; Jaworski, Pritchard, eds., 2005; Jaworski, Thurlow, 2010; Hallet, Kaplan-Weinger, 2010]. G. Dann's sociolinguistic concept of the language of tourism – the language of modernity, promotion, and consumerism, characterized by extensiveness and persuasiveness, and at the same time a source of social control over the tourist-child – corresponds to this view [Dann,

1996]. This unique type of communication is represented by the world of modern tourism – a field of industry and a form of social interaction between individuals and groups. Dann, of course, distinguishes between a language, which may be ideologically neutral, and a discourse, in which the systems of knowledge/power and domination are reproduced. The theoretical assumptions and analytical tools he proposed are an inspiration and a reference point for researchers dealing with issues of motivation, sociolinguistics, semiotics, and the promotion of tourism. In later years, Dann [2005a] has modified his approach, for example, by characterizing the notion of a trialogue in contacts between tourists, residents, and organizers of tourism, taking into account the new communication media and the changes language is currently undergoing in cyberspace.

> Via static and moving pictures, written texts and audio-visual offerings, the language of tourism attempts to persuade, lure, woo and seduce millions of human beings, and, in so doing, convert them from potential into actual clients. By addressing them in terms of their own culturally predicated needs and motivations, it hopes to push them out of the armchair and on to the plane – to turn them into tourists. Later, the language of tourism gently talks to them about the possible factors or attractions of competing destinations. Thus, since much of the rhetoric is both logically and temporally prior to any travel or sightseeing, one can legitimately argue that tourism is grounded in discourse [Dann, 1996, p. 2].

The Critical Turn and Discourse Analysis in Tourism Studies

Contemporary interdisciplinary, transdisciplinary, or postdisciplinary trends are referred to as the "critical turn" [Fairclough, 2000; on the critical turn in tourism studies see i.e. Phillimore, Goodson, eds., 2004; Ateljevic, Pritchard, Morgan, eds., 2007 etc.]. This approach is based on admitting that the disciplines of the social sciences are in fact "a set of historically constituted practices of assessing the social world in different ways" [Graham, 2008, p. 34]. The boundaries between them are thus of a historical and discursive nature, and it is different ways of assessing social reality that determine those boundaries. Reflection and, at the same time, the source of the fragmentation of research in language makes it "the area of meaning that ultimately coordinates our social environment" [ibidem]. Therefore, any critical social study on society should be initiated by a discourse analysis, and an appeal to axiology:

> If we recognize that social science disintegrated into disciplines according to the of deep semantic faults of evaluative meaning, each critical turn in social

science must begin with the unified theory of evaluative meaning. If we are to understand the profound changes that we experience as a species, we must understand the nature of our species – our common humanity – not just from psychological, economic, political, ethical or discursive perspective: **we have to perceive the dynamics of making meanings as the dynamics of our mutual relationships. Truly critical discourse analysis is the start of any critical social science, not its crowning achievement.** [Graham, 2008, p. 57; my emphasis – SO].

Critical discourse analysis, understood as a research program of a transdisciplinary nature, enables the examination of the dialectical relationships between discourse and other forms of social action [van Dijk, 2001; Duszak, Fairclough, eds., 2008; Wodak, Meyer, eds., 2009]. This transdisciplinary approach establishes dialogue between disciplines and paradigms, which can bring about "development through an internal process to appropriate the logic of one discipline by another as a source of self-development" [Chiapello, Fairclough, 2008, p. 402]. A key role in this process is played by the recontextualisation of concepts and research methods.

A discourse is identified with semiosis (which is seen as irreducible element of social life) and includes all its forms, i.e. language, images, sounds, gestures, body language, etc. [Graham, 2008; on semiotics of tourism see also Culler, 1981; MacCannell, 1989, 2002; Dann, 2004, 2005a; Urry, 2007; Wieczorkiewicz, 2008; Owsianowska, 2008]. But social life is regarded as the "interconnected networks of different types of social actions," that is, relatively stabilised forms of social activity, such as family, cultural, political, economic. In social action such elements can be indicated as: activities, actors, and their social relationships, tools, objects, time and place, a form of consciousness, values, and discourse/semiosis: "these are different elements, but not entirely separate. In a sense, each of them 'internalises' all the others, without being reduced to them" [Chiapello, Fairclough, 2008, p. 383]. Despite the interpenetration and interaction, they retain their distinctiveness and are the subject of research of different disciplines.

In social actions, a discourse is manifested in three ways. First, as a component of any activity – in everyday conversation, business meetings, work situations, interviews, reviews, books, etc. – creating the "genres," or types of that activity. Secondly, in the (reflexive) representations of actions and discourses[1] that constitute them, which are formed by social actors, depending

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[1] "Discourse" as an abstract concept must be distinguished from a discourse – a countable noun, appearing in the plural to denote different ways of implementing the former. For example, within the discourse of tourism, various discourses are distinguished, including museum discourse, heritage discourse, nostalgia discourse, a return to roots discourse, etc. Dann [1996] has suggested a number of registers of the tourism internal discourse (used by organisers and

on the position they occupy in a particular activity. Thirdly, and finally, discourse is manifested in a way of being, style, or bearing, in the creation of identity. Genres, discourses and styles associated with each other, constitute the social order (the order of discourse) in a special way:

> The order of discourse imposes the social structure on semiotic differences – a specific social order of relationships among the various ways of creating meaning, i.e. of various discourses, genres, and styles. Dominance is one aspect of this order: some ways of making meaning are dominant or the mainstream of the order of particular discourse, others are marginal, in opposition, or 'alternative' [Chiapello, Fairclough, 2008, p. 385].

Critical Discourse Analysis (CDA) allows for a better understanding of tourism and its meta-narration, through a critical and intertextual analysis of semiotic data [Yan, Santos, 2009, p. 300]. Conclusions from selected research projects show a wide range of applications of CDA, exposing more (or less) subtle ways of social "segregating" travellers, with indications of the representatives of privileged social groups, such as in airline magazines [Thurlow, Jaworski, 2006; Small, Harris and Wilson, 2008]; identifying techniques for presenting a protected natural heritage, with a designated recipient, propagated forms of tourism [Stamou, Paraskevopoulos, 2006]; representing ethnic and cultural diversity, discovering strategies to help "naturalise" tourism promotion discourses in order to meet the criteria of rationality and political neutrality [Feighery, 2006]; reconstruction of the traditional ways of presenting the Other and strangeness (including in a diaspora situation) [Santos, Belhassen, Caton, 2008]; receiving an external discourse (e.g. on orientalism) as binding in the interpretation of one's own heritage (autoethnocentrism) [Yan, Santos, 2009]; portraying representatives of various social groups, including (un)equal treatment on the grounds of gender, race, ethnicity, disability, age etc. [Aitchison, 2001; Caton, Santos, 2005]; and (re)construction of national or ethnic identity [Hallet, Kaplan-Weinger, 2010].

In the first decade of the twenty-first century, there have been numerous publications that have filled the gap in research on language/discourse on tourism. They emphasize the impact of increasing mobility – of people, ideas, capital, objects, etc. – on language, which itself is also on the move [Jaworski, Thurlow, 2010]. In response to the challenges of the modern world, and in connection with reconceptualisation of key social theories, the assumptions of sociolinguistics, which recognizes language as a phenomenon

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visitors): *Ol'talk* – for cultural heritage tourism, *Spasprech* – for health tourism, *Gastrolingo* – for gastronomy-related culinary tourism, *Greenspeak* – for ecotourism.

determined culturally and socially, have also been reformulated [Blommaert, 2005]. The fluidity of such basic categories as human life and identity, and the lack of any clear indication of sources of authority and monitoring of how it is exercised, are some of the determinants of the changes that are occurring. Researchers focused on how language functions in society point out that sociolinguistics and discourse analysis are better able to recognise and analyse what is "hybrid, supra-regional, spectacular, unique, creative and multi-modal" [Jaworski, Thurlow, 2010].

Emphasizing multimodality clearly situates performance – the popular metaphor of the tourist experience – precisely in terms of discourse [Edensor, 2001; Jaworski, Thurlow, 2009]. Discourse analysts "have found the idea of performance useful in understanding how aspects of personal identity, such as gender, ethnicity, and regional identification, are connected to discourse" [Johnstone, 2002, p. 23, cit.: Hallet, Kaplan-Weinger, 2010, p. 13; see also: Butler, 2008; Alexander, 2009]. Performativity concerns not only individuals, but also places. Performance involves participation and agency, and today subjects of analysis include the results of actions of both humans and non-human beings, including objects – such as computers and their networks – incorporated into the circle of equal actors/actants of social actions [Jóhannesson, 2005]. The development of technology and its participation in cognitive and communication processes requires the redefinition of earlier media theories – including those referred to by Levinson [1999] as *anthropotropic* – according to which "their new forms more and more accurately reproduce the natural patterns of communication between people (while they still extend the reach of human senses in space and time)," and – in order to survive – they must obtain "proper compliance with the human way of perception" [ibidem: 160; see also: Maj, Derda-Nowakowski, 2009].

The concept of new media remains problematic, as emphasized by, among others, L. Manovich [2006], the creator of the concept of post- or meta-media, which utilize and process the source material of the "old media." As a combination of different visual elements and techniques – through a process of remediation, and media convergence – a contemporary language emerges which is a new, hybrid form of expression. Manovich distinguishes between two different research areas, such as new media and cyberculture. In the first, analyses and interpretations relate primarily to aspects of culture and information, while in the second – to social issues (the creation of online communities, identity, gender issues, etc.). One of the most important cyberculture phenomena is social media – platforms and applications that help users browse the Internet and at the same time organize their experience. These include uploading photos and videos, writing blogs and

microblogs, subscribing to RSS feeds, sending messages, online chatting, etc. Their main purpose, however, is social networking. According to a concept by Maffessoli [2008], neo-tribes play an important role in creating new forms of tribalism, connecting people, not so much for ideological reasons as for the taste/flavor and aesthetic. However, from the viewpoint of marketing, social media are seen as an excellent venue for effective advertising, distribution channels, and a source of feedback about the content and conducting of campaigns, and therefore a space of interaction, generating stories of Internet users (digital storytelling), and involving them in promotional initiatives.

Poland. Move Your Imagination: Competing Discourses and Identities

In March 2011, a promotional campaign began in Poland, entitled "Poland. Move Your Imagination." Besides sneak previews and presentations at the ITB in Berlin, the commercials were also broadcast on television, and are available on the Internet. On social networking sites, e.g. Facebook, one can get information about the campaign and exchange opinions with other consumers: experts, inhabitants of the country, and (potential) tourists. Comments and discussions are also contained in the latest news reports, expert blogs, etc. Below three elements of the campaign are discussed: an animated series (POLEN), seven short films (It Happened in...), and a presentation on the POT website (Poland likes it!).

P, O, L, E, N

The broadcaster of the promotional campaign under discussion is the Polish Tourist Organization (Polska Organizacja Turystyczna – POT), and the creator was the Platige Image Studio (http://community.platige.com/news/503). A series of animated films includes those on tourism (directed by R. Wojtunik), culture (directed by J. Jabłoński and B. Kik), nature (directed by D. Nenow), and the Euro 2012 (directed by T. Bagiński). The last named, Tomasz Bagiński (2003 Oscar Nominee for "The Cathedral," and the creator of an animated history of Poland, presented at EXPO 2010 in Shanghai, China), along with M. Kobyłecki and J. Jabłoński, were responsible for the visual setting; they also prepared a stereoscopic show for the ITB Opening Ceremony in 2011 (Poland was this year's official fair partner country). This event provided the opportunity to initiate an image campaign and to

introduce the "Move Your Imagination" slogan. Five "creatures from outer space" were the main characters. They were designed after popular vinyl toys (urban toys), with surprising shapes that are quite difficult to read, and – as can be seen from the description on the POT website and on Facebook – a carefully planned symbolism [http://www.poland.travel/en/news-from-poland/itb-vinyl-toys]. As a reminder of the EURO 2012, a ball was incorporated into each character. In the characteristics of P, O, L, E and N, which spell out the German word for Poland, we find a reference to their passions and interests, motivations, and favourite ways of spending their free time. Advertising broadcasters thus turn to specific audiences, demonstrating the feasibility of the values they seek during their stay in Poland, as cultural, active, culinary, and leisure tourism.

The aim of the first part of the campaign was to stir interest and emotion, through spectacular, high-quality undertakings, and to introduce elements of surprise, challenging the prevailing stereotypes (e.g. the polar bear). But did such a radical step and the abandonment of existing motives in creating the image of the country meet with the audience's understanding and approval? The symbolism of Polish folk culture (including paper cuttings, dance) woven into animation, references to culture or the typical local climate (symbolizing the current transformation) turned out to be insufficiently explicit. The relationship between national/ethnic culture and patterns drawn of global "melting pot," mainly mediated by the media and tourism itself, is one of the more controversial aspects of the promotional message. Advertising is a collage of sources of inspiration and cultural contexts, typical of the poetics of postmodernism and the language of the new media. This includes the incorporation of "foreign" or universal elements to the image of national/ethnic culture and the lack of a single symbol – an icon of the country – to integrate all the messages. "Creatures from outer space," cartoons, comic representation of attractions of the country, modern dance stylized to folk, references to Asian martial arts etc.; these ambiguous threads polarized audiences (as evidenced by statements on social networking sites, such as YouTube and Facebook).

The reception of transnational, global content is not always justified, because tourists are more interested in what is typical for the particular culture, unique, and extraordinary. The tendency toward cultural unification, places becoming similar to each other in different parts of the world, encounters criticism, expressed as the "McDonaldization" or "Disneyfication" of reality [Ritzer, Liska, 1997; Podemski, 2005]. No wonder, then, that many comments reiterate that in fact – despite the interesting ideas and high quality of execution – the films do not show Poland, its natural beauty and cultural richness. As for the natural assets on display, there is also criticism of the promotion

such forms of recreation that do not take into consideration environmental protection and the rules of sustainable development of tourism, such as riding a quad in the mountains and "roaring" jet skis on the lakes.

IT HAPPENED IN…

A series of seven short films (totalling 9 minutes and 13 seconds) won first place in "The Golden City Gate" Berlin Film Festival, accompanying the ITB. Poland's image manufacture is focused around seven values: youth, love, freedom, music, friendship, creativity, passion [on the axiology of tourism see: Lipiec, 2008]. The creators of the advertisements tell stories of tourists visiting Poland, but we learn at the end where the action takes palce, in the sentence: "it happened in ..." The image they create foregrounds certain assets and aspirations of these places while pushing others into the background, e.g. Krakow, shown as a city of love and art, does not have much in common with modern times, while Poznań – perfect for business meetings – has no monuments and culture. Each short film is addressed to a clearly specified target group, of a certain age, with preferences for their leisure activities, mode of travel, etc. In the composition of stylised images and accompanying music, the essence of creation is based on experience – full of dynamic "storytelling": romantic, nostalgic, funny, and magical. Their promotional strategies to portray people and places are reproduced and creatively reinterpreted with reference to timeless issues and mythic structures, sometimes treated *à rebours* [Dann, 1996, 2011; Selwyn, 1996; Wieczorkiewicz, 2008]. Below I discuss some examples.

The first on the list, Warsaw is not shown this time as a place for businessmen and politicians, but as a city of clubs and carnival atmosphere. Of course, the background is filled with modern office buildings and main architectural symbols of the capital, such as the Palace of Culture and Science, the Royal Castle, the Sigismund Column, and the Mermaid. But the mood of joy and fun (dancing people, a rooftop café, dynamic music, etc.) is the most important. As for the residents, the advertisement's narrator underlines the attentive waiters (an industry worker), as well as the friendly and beautiful girls. In advertising, Benjamin's flâneur figure, who has gone down in European culture as the topos of the solitary wanderer [Jokinen, Veijola, 1997; Franklin, Crang, 2001] returns here as a young tourist from the Netherlands, with a camera (and laptop). The apotheosis of youth, with its energy and spontaneity, and the promise to return to the land of carefree living [Dann, 1996], becomes part of the previously mentioned interpretations of the tourist experience.

Krakow is presented as a town for tourists who prefer luxury, such as an exclusive hotel with a view of St. Mary's Basilica and the Cloth Hall. Sophisticated, full of romanticism and magic, where culture is appreciated, and the highest values, such as love and art, are respected. Dramatic connotations are evoked in part by the fact that the plot of the film is set in the Juliusz Słowacki Theatre. The whole city is like a huge stage [Edensor, 2001; MacCannell 2002], on which hospitable and helpful residents/intermediaries perform (e.g. a souvenir salesman dressed in folk costume, the hackneyed cab driver), and – to paraphrase the famous saying – "all roads lead to Wawel Castle." The music introduces a mood of mystery and sublimity, to highlight the moments in which we appreciate what is most important in life.

The story of another short film is equally romantic and nostalgic. (On romanticism and nostalgia in tourism promotion see, among others, Dann, 1996). With the sounds of the piano, the swoosh of surf and the cry of gulls, a pair of elderly people from Denmark are hiking with poles (Nordic Walking), spending their time in Gdańsk and the Tri-City, Poland. On the beach they pass children playing and watch a group of young men who are kite-surfing. Freedom is evoked here not only by the distant sea, the wind, and the desire to fly out and experience exciting adventures. Freedom is also connected with recent Polish and European history, which is embodied by the yard through which the Danish tourists' route leads. A sense of security, peace and happiness emanates from the moments spent in this picturesque corner of Gdańsk (Mariacka Street), or in the outdoor café with a glass of wine.

The next two short films show their locations from the perspective of interests, both personal and professional. The attractiveness of the city is shown to a much lesser extent – the main attention is focused on the opportunity to participate in cultural events and carry out business.

Wrocław, in which the largest jazz festival in Poland is held annually – "Jazz on the Oder" – is visited by an elegantly dressed French musician, Miles. He paces the city centre, rests in the Market Square and at the fountain, and finally asks a street musician for directions to a café that hosts cultural events, where at present a concert is taking place. The audience enthusiastically expresses admiration for the talent of the artist. Miles is black, so in this picture reference to the discourse of emancipation (Racial Equality) can be seen [Denzin, 2009].

Poznań is presented during a businessman's one-day official visit from Germany. The departure and arrival aircraft frame an episode lasting several minutes. A meeting with young, talented and creative Polish designers takes place in a modern interiors, and is crowned by the signing of a contract, a glass of whisky, and a basketball game played on the terrace. Pas-

sion, action, creation and professionalism – as well as with freedom (above) – are primarily associated with men. Women are present in the background or only metonymically invoked (e.g. by high heels).

In Masuria, the lake district in Poland, which is one of the most top-rated natural locations in Europe (aspiring to become one of seven new wonders of nature), the world seems paradisical, a sanctuary of unspoilt flora and fauna, filled with wild animals, while people cherish friendship and family ties, and prefer the idyllic atmosphere and *dolce vita* – far from the hustle and bustle of urbanized societies, consumerism, and the erosion of human relationships. As concerns gender roles, the young and attractive hostess, who is visited by a friend from Belgium along with his parents presumably, is shown not only (traditionally) in the kitchen, but also in the carpentry workshop, doing typically male activities.

In the last episode, filmed in a black-and-white "old movie" convention in the post-industrial "Polish Hollywood" scenery in Łódź, a young Spaniard is trying his luck in the industry. He passionately sets about working on his task, and his photographic documentation of the city not only records scenes from the set (mostly featuring men – the director, the cameraman, etc.), but also a rock band, starring an extravagant female guitarist. There is also a reference to religiousness – in the form of an elderly woman at a shrine covered in flowers, and more specifically, her hands clasped in prayer. It seems that the script writers of advertising, putting a camera in the hands of the film school candidate, and using the cultural and temporal distance achieved through the adopted convention, have tried to portray the passage of Polish social reality, both traditional and modern, full of contradictions and dynamics, from the perspective of the newcomer and outsider.

POLAND LIKES IT!

In a multimedia presentation available at the national tourist organization website, the same axiological foundations of the country's image were adopted as in the above-discussed films. A particular romanticism was used to emphasise the mentality and traditional lifestyle typical for Polish history. Crucially, this image is articulated in a language modelled upon communication styles of the younger generation, the main users of the Internet. Individual stages of presentation are run as in Instant Messenger, when the person one is talking to is "online." Photographs and short notes that resemble the emoticons-filled style of SMS messages and microblogs appear accompanied by the sounds of Chopin's compositions. Still, the message con-

tains important information from the past and present of Poland, profiles of famous and lesser-known Poles who have excelled in various fields – art, science, sports, and politics.

Apart from being full of facts, the presentation sheds light on the natural and cultural heritage of the country, the mentality of Polish people, and their habits and customs, which are expressions of traditional (including patriarchal) relationships [Jezinski et al., 2009], and manifestations of re-defining them in contemporary social life. It is another step in a campaign to encourage "the work of the imagination," which is complements the message about the country and its people started in the animated version. Stylistically subordinate to the language used primarily by young people, it highlights one of the main ideas of the promotional campaign – 'Poland Means Youth' (including the spirit of youth, independent of age). At the same time, it again recalls and tries to re-define – in the context of Polish culture – such values as love, passion and creativity, music (which in an eminent composer's description also means equality for people with different sexual orientation), and freedom (and thus also tolerance for all religions). The images are accompanied by descriptions of breakthrough discoveries, heroic deeds, and extreme sports accomplishments, as well as life-styles comprising a romantic "perception of reality through the heart," and a penchant for tradition (e.g. cuisine and festive celebrations), but also modernity and pragmatism, which expresses itself in seeking to streamline daily activities (e.g. through various technological inventions).

Conclusions

With the spread of the Internet, Web 2.0, and Augmented Reality (AR) technology, the language of tourism used in promoting destinations and projecting travellers' experiences is also being modified. Using the examples of messages analyzed above, we can see how new information technology solutions are entering the realm of not just a project's technical implementation, but also become an integral part of the world presented in the advertising. Characters and landscapes in computer animation, space creatures as tourists, stereoscopic shows coupled with performances of live dancers, the language and style of twitter microblogs and other social media, based on methods of communication in cyberspace, a cube that allows interactive participation in a performance – these are the selected, hybrid, and multimodal means of expression. *The medium is the message*, as noted by M. McLuhan, a major media theorist, which we can see more clearly than ever before in modern communication.

A die was one of the key elements of an image campaign in Berlin (ITB 2011) – a white one, that might be held in one hand and symbolises, as T. Bagiński explains, that "we are an accessible country, open, whose message appeals to all (...) we have used the universal meaning of a die, which is known at any latitude as an element of fun that connects people. As throwing the die in a game introduces the unknown and raises the players' excitement, the die that promotes Poland is intriguing." During the campaign the die plays the role of a "peculiar guide" – by rolling it the guests participating in the show were able to interact with the 3D computer animation world, play movies that show the advantages of the country, and thus to choose their method of sightseeing. This simple and versatile item enabling an interactive participation in the presentation was also supposed to – and does – evoke a variety of positive associations. Was this effort successful in creating these new associations connected with the Polish identity, to symbols selected by the promoters and creators of the country's new image? Our answers will obviously differ, and the question itself remains open. However the fact that "the world campaign" proposed by the promoters of tourism in Poland is not clear and unambiguous in its interpretation, especially for its residents, is implied not just by – as it seems – the peculiarity and originality of messages analyzed. It is an expression of a search for new discourses and identities in an era of globalization, new media, and universal mobility.

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USING R.W. BUTLER'S MODEL TO INTERPRET THE DEVELOPMENT OF TOURIST ATTRACTIONS, BASED ON THE EXAMPLE OF THE SALT MINE IN WIELICZKA

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Abstract: Tourist attractions are the main feature of a tourism product. The Salt Mine in Wieliczka is the most visited and best commercialized tourist attraction in Poland, unique on a world scale, a mining site inscribed on the UNESCO list. In the following work, the authors have attempted to use R.W. Butler's model of tourism area evolution to interpret the mine's phases of development. From 1945 to 2007 two cycles of development are isolated, the collapse of tourist attendance in the mines being caused by external factors (the collapse of the tourism market in the 1980s and the flooding of the walkways in 1993). At present, the mine receives over one million tourists a year, placing it at the forefront of the most popular tourist attractions, while the changes to the tourism product and the structure of the visitors indicate that it is achieving the 'rebirth' phase outlined by Butler's model.

Key words: tourist attraction, Salt Mine in Wieliczka, TALC Tourism Area Life Cycle, Butler Cycle, Butter Model.

Introduction

Among the diverse conditions of contemporary tourism development, tourist attractions play a key role; they are one of the most important components of a tourism system. Gunn and Rusk [1979, p. 371] describe them as the main ingredient of the whole system, alongside such components as transport, tourist services, information and management. The notion of "tourist attractions" is a broad one, including not only elements of nature and culture, but also price levels, the attitude of the locals toward tourists and tourism, the tourist facilities and the whole technical infrastructure, and the chance to experience something remarkable.

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The Wieliczka Salt Mine is one of the world's most famous tourist attractions. Beyond its rich history and the many functions it has served in society (education, culture, health etc.), it is also an important research site. One of the fields of research that takes place is the tourist activities in the mine.[1] This is why the aim of the following work is to analyze the development of tourist paths in the Wieliczka Salt Mine from 1945-2010, with reference to R.W. Butler's concept of tourist zone development. His Tourism Area Life Cycle concept (TALC) ties in to the familiar economics theory of the product life cycle, and the development of animal populations. In the 30 years since its publication, Butler's concept has been applied to research on the development of tourist sites and areas, of health spas, ports and tourist products. We might approach the Salt Mine in Wieliczka as both a tourist attraction and a complex tourist product. The value of the attraction itself generally decides upon the quality of the product, which is the core of the profit in the tourist product structure. Researching an attraction might help marketing goals tied to evaluating and managing a tourist product. The measure of the value of a product is its power to attract tourists; the fluctuating tourist attendance can be represented by the logistic function "S." The present authors have presupposed that it is possible to use the model of the Tourist Area Life Cycle to analyze the development of single tourist attractions as we do locations or tourist products.

The Characteristics of the Salt Mine in Wieliczka

The beginnings of the salt mine date back to the latter half of the 13th century, if we overlook the salt manufacturing that occurred somewhere around 5,000 years ago. The work of several dozen generations of Polish miners shaped an underground world that is unique for its beauty and its astonishing size.

The mining site is unique on a world scale, containing an underground chapel with rich decor, original walkway construction, and chambers where miners once worked, featuring mining machines and equipment.

UNESCO inscribed the mine on its first World Natural and Cultural Heritage List, where it was placed among the world's top twelve sites. For many years it served a dual function: salt was mined, while other cham-

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[1] In 2005 the directors of the Salt Mine in Wieliczka signed a contract to collaborate with the Physical Education Academy in Krakow. The college took academic patronage over the activities being carried out at the Wieliczka Salt Mine in tourism and physiotherapy, and Dr. Zygmunt Kruczek was named plenipotentiary in carrying out tourism agreements.

bers were made accessible to tourists. Today, the mine is chiefly a tourist site, attracting hundreds of thousands of tourists annually [Kruczek, 2006, p.131].

The mine is well prepared to receive its guests. The site is accessible to tourists for twelve hours a day. It is serviced by a professionally trained personnel, who speak a number of languages. Around 300 qualified guides work the mines. Before entering the shaft, tourists can pick up information materials (guides, folders, video cassettes) in 12 languages. On the tourist route souvenirs are available in an underground store, and there is an underground post office, a restaurant, a cafe, and restrooms.

Each year the mine holds events on a regional, a national, and even a world scale, attracting thousands of tourists. The most popular of these would seem to be the International Minerals, Fossils and Jewelry Fair. An added attraction for the fair's visitors is the fact that they can try their hand at sculpting with a chisel and salt rock. Other equally popular events include the Underground International Tourist Attraction Fair and the "Personality of the Year" concerts. In 2000 the mine held the world's first underground "Bungee Jumping Show," and the world's first underground hot-air balloon flight. Moreover, the mine offers tourists a wide range of services, including conferences, concerts, masses for groups of pilgrims, wedding ceremonies, and banquets, dinners, and lunches. There are also New Year's Eve parties and pre-graduation parties (*studniówki*). An underground tennis court and a field for team sports are available. Finally, the mine offers specialist guides that take visitors beyond the tourist routes.

The mine is constantly working to improve its tourist program. All efforts are made to take advantage of the opportunities that the mine provides, and to draw the greatest number of visitors. One of the more important investments to increase the mine's draw is the construction of a second shaft – the "Regis" – into which tourists will descend from the surface in the very heart of the town. Guests will travel in a stylish railway car from under the "Wisła" chamber to an elevator. One of the more important planned undertakings will be the staging of legends in English (they have thus far been performed only in Polish). A multimedia museum has been created in the newly opened chambers, allowing inaccessible parts of the mine to be "visited" (such as the Crystal Grotto inanimate nature reserve); new tourist products are also continually being created, such as the "New Adventure Route" for thrill-seekers.

The Wieliczka Salt Mine is a modern management enterprise that employs around 250 full-time workers and over 300 tour guides. The presently implemented Motivational Reward System is a priority of the business strategy in personnel policy [Kruczek, 2006, p.132].

The attractions incorporated in the "Wieliczka" name are handled by three companies:

- The Salt Mine Museum (a unit controlled by the Ministry of Culture and National Heritage). Two exhibitions have been arranged – in the underground passages of the mine, and in the Salt Mine Castle up above,
- the "PPU Wieliczka" health resort.
- The Tourist Path Co. Ltd.

In 2010 the Wieliczka mine was visited by over one million tourists, i.e. 2% more than in 2009. The mine is increasingly visited by tourists from abroad – in the period mentioned, they represented 58% of all visitors. In 2010 the British accounted for most of the foreign visitors to the underground tunnels (58,874), followed by the Germans (40,248), Italians (37,617), French (33,575), and Koreans (32,540). The top fifteen were rounded out by Norwegians, Americans, Spaniards, Russians, Hungarians, Czechs, Slovaks, Swedes, Ukrainians, and Japanese. There were 4% more Polish visitors than in the year previous.[2]

Guides descended into the heritage underground tunnels 43,000 times in 2010; over half of them were Polish. Foreigners had guides speaking ten foreign languages at their disposal. English, German, French, and Italian have enjoyed the greatest popularity for a number of years.

Sociological studies indicate that tourists experience Wieliczka on the highest emotional level. Leaving the mine, tourists are enormously excited and satisfied – in a word, they are entirely content with having visited this place. It is only for a minority of visitors that the mine is monotonous and becomes tedious (after repeated visits) [Holota, 2001, p. 72].

An attraction of great renown should be profitable**,** and can be financed from three sources:

- private sources (tickets and entry passes, services, souvenirs, space rental),
- foundations, sponsor grants, bursaries,
- budgets (states or local).

The Wieliczka Mine is a profitable tourist attraction, and only uses budget resources to a minor degree. The number of visitors has the greatest impact on the mine's income. Ticket proceeds make up three quarters of the mine's tourism income. In 2002, the Minister of the Economy and the National Chamber of Economics awarded the mine the status of Founder of the Brand-Name Academy, thus emphasizing its role in the development of the Polish economy. This distinction confirmed that the mine enjoys a fine reputation and deserves to be called a brand-name company. The Wieliczka

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[2] Salt Mine Ltd. data (www.kopalnia.pl; as of 12.06.2011).

Salt Mine was among the top winners of the "Golden Fifty" poll. In 2005 the Polish Tourism Organization awarded a special certificate of quality for the "Underground Escapade, or: An Adventure Tour" product.

Cyclical Development at the Salt Mine in Wieliczka

Economics literature presents numerous concepts of product evolution, among which the most well-known is the product life-cycle formula [Kotler, Turner 1993, pp. 3271-3397]. Focusing on the cyclical nature of the changes occurring in a product's development (in the *largo* sense) caused this issue to develop *vis-a-vis* many typologically diverse products and services.

The phasic aspect of the shifts in tourist area popularity (as a product) has been noted by researchers including S.C. Plog [2001, pp. 13-24], J.M. Miossec [Pearce, 1995, p. 15], J.M. Thurot [Pearce, 1995, pp. 6-14] E. Gromsen [1981, pp. 150-170], and M. Opperman [1993, pp. 535-560]. And yet the concept most frequently confirmed in the literature is R.W. Butler's TALC [1980, pp. 5-12]. TALC (Tourism Area Life Cycle) is a concept that describes the changes occurring in the evolution of a tourist area. These changes are described through six phases, characterized by different dynamics and focuses of the areas analyzed, using symptomatic variables, such as the number of people coming to a certain area over the course of a year.

R.W. Butler gave symbolic names to the various phases: *Exploration, Involvement, Development, Consolidation, Stagnation,* and *Rejuvenation* or *Decline*. Thus, the first phase (exploration) takes place when countless individual tourists arrive at a given location, attracted chiefly by its natural or cultural assets. These are tourists who independently organize their trips, and follow no tried-and-true recreation paths. Their impact on the lives of inhabitants and the local economy is minimal.

Involvement takes place when tourists visit an area in growing numbers, and some of the inhabitants begin to draw their livelihood from accommodation, gastronomy, health services, and the like. The inhabitants' involvement proceeds through becoming active in the tourist economy, or even focusing their activities exclusively on visitors. Expectations arise in the area for organized forms of recreation, and there is pressure to improve transport and conveniences for tourists.

The *development* phase begins at the moment when the tourist area becomes one of the main sources of income, and the number of tourists is either equivalent to or exceeds the number of permanent residents (at the same time, this is a signal that the tourist market is well defined in the area being studied). Tourist organizations from outside the tourist
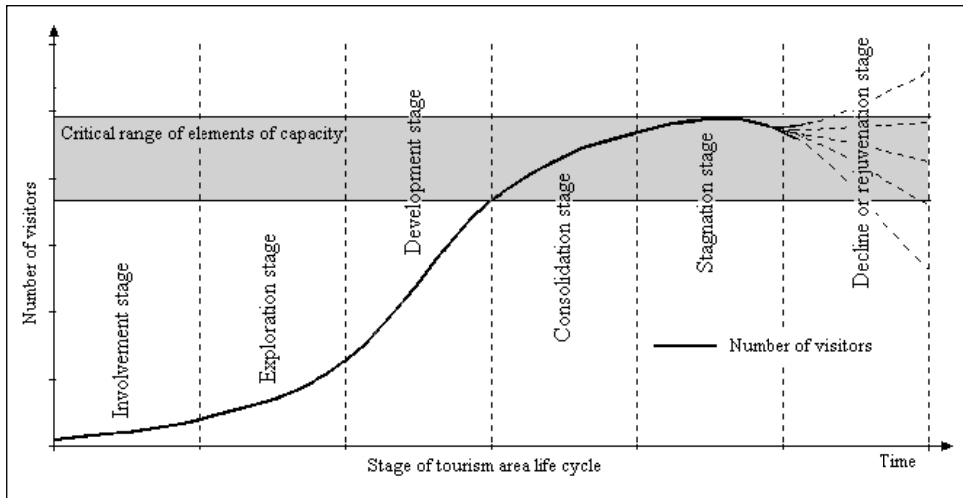
Figure 1. R.W. Butler's tourist area life cycle
Source: developed on the basis of Butler [1980, pp. 5-12].

area enter the region, pushing out the local businesses and depriving the permanent residents of control over the development of how tourism functions in the area.

The *consolidation* phase marks the full development of the tourism functions in a given area. It is characterized by a reduced growth in numbers of tourists, and by tourism becoming the dominant industry in the local economy. A gap occurs between the spaces with the town's health/tourist functions (sanatoriums, hotels, restaurants, etc.) and those with social functions (e.g. households). Projects are taken up to extend the tourist season and to expand the area in which services are offered. Antagonism from the local population can grow with the intensification of obstacles in running a business.

The *stagnation* phase brings a decisive halt to the growth dynamic of the number of visitors, the attainment of a maximum quantity of tourists in the area, and then a decline in the number of visitors. At this point the area has a very well defined profile, but it has ceased to be fashionable, and its image no longer fits the region.

The last phase of the cycle is either the *rejuvenation* or *decline* of the area's tourist function. *Decline* is characterized by a drop in numbers of tourists, and the closure of unprofitable tourist sites or their transformation into typologically different venues (e.g. social care houses, private apartments). The area is no longer capable of rivaling other more attractive places for tourists. The services on offer are reduced, making the location

increasingly unattractive, which makes it draw less and less tourists. If the area has a sufficiently large infrastructure, weekend or one-day tourists appear. The local population becomes involved, this time generating demand by offering services that are accessible at a lower price. The decline phase can conclude within the total or partial disappearance of the tourist function in a given area.

The area can, however, enter a phase of *rejuvenation*, though this is impossible without a conscious and complex program of activities to enhance the attributes that decide on an area's attractiveness. This can be achieved through introducing artificial attractions (e.g. by turning buildings into a network of casinos) or by using unexploited natural resources.

Among the works that tested R.W. Butler's concept were those by S. Lundtorp and S. Wanhill, who in 2001 estimated the logistic function as a mathematical formula of the course of the phenomenon on the Bornholm Island [Lundtrop, Wanhill, 2001, pp. 947-964]. While the logistic function is a very fine model to explain the development of many economic phenomena, its interpretation is not a simple affair. Nonetheless, S. Lundtorp and S. Wanhill attempted to estimate the logistic function and describe its properties in terms of the phases described by R.W. Butler. The experiment aimed to verify the accuracy of the estimated function of the described phenomenon based on a limited number of observations. Although S. Lundtorp and S. Wanhill stress the high applicability of the development model using a logistic function, they simultaneously prove that it is not applicable before the full formation of the first phases of the cycle. They confirm this thesis in their next article of 2006 [Lundtrop, Wanhill, 2006, p. 146]. As such, we have empirical proof that the logistic model can predict phenomena only after the majority of the phases have been formed, and moreover, that it provides no opportunity to foresee the final phase of the cycle (decline). It therefore serves only to describe the phenomenon *ex post*.

Part of the achievement of S. Lundtorp and S. Wanhill was also to provide knowledge on the phase division of the cycle which surpassed the *inflection point*. Researching the properties of the function, and in particular its characteristic points (calculating the zero points through the various derivatives) they established that the natural division resulting from the logistic function breaks down into five phases, of which the first occupies the range marked out between 0% and 9% of the maximum value of the function, and the following ones between 9% and 21%, between 21% and 79%, and between 79% and 91% of the maximum (100%). At the same time, the accurate estimation of the logistic function permits the calculation of both the inflection point and the maximum function, which in turn allows the various phases of the model to be marked out.

Analyzing the curve in the development of the tourism traffic at the Salt Mine in Wieliczka, we used the data collected by the site concerning the number of people visiting the mine over annual periods. The result was a time sequence describing the fluctuation over a period of 65 years (between 1945 and 2010).

We note that the curve in the development of the intensity of tourist traffic in the mine has taken an extremely interesting course. This results from the several changes in the area's direction of development over a long period. The changes that occurred have been described through a well-matched ($R^2=0.94$) fifth-degree polynomial function. The complexity of the function alerts us to the high fluctuation of the number of visitors in the site's various stages of functioning.

$$\hat{y}_t = 0{,}359t^5 - 23{,}30t^4 + 641{,}9t^3 - 7063t^2 + 43735t$$
$$R^2 = 0{,}941$$
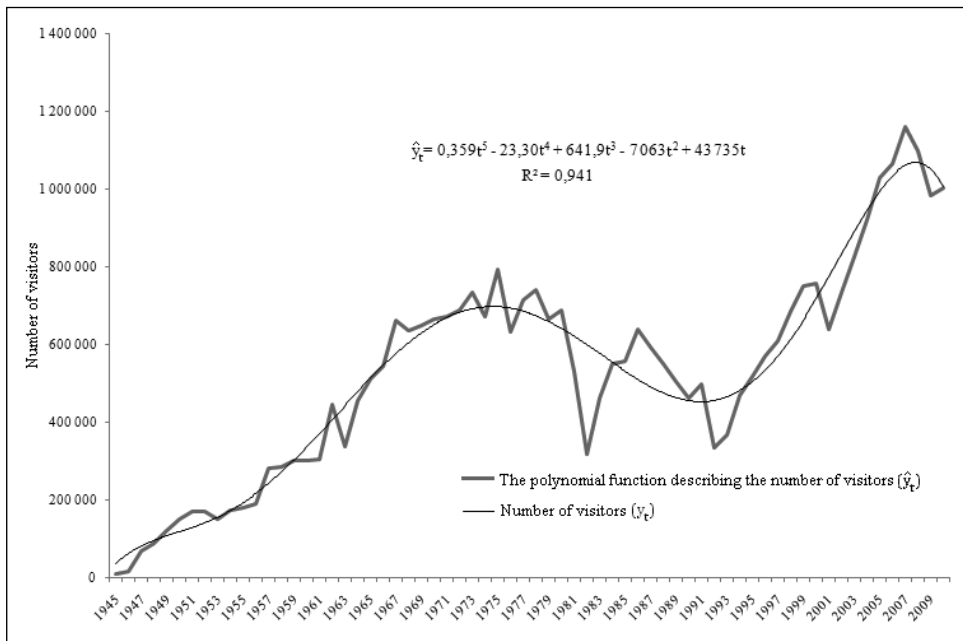
Figure 2. Development of tourist traffic at the Salt Mine in Wieliczka
Source: Own calculations based on Salt Mine data in Wieliczka.

Historical events and an analysis of changes in the number of visitors to the site allow us to isolate two cycles of development for this area. The first is the period (herein called "A") from the end of World War II (1945) to the turn of the 1980s/90s, while the second period (B) covers the period of time that began at the turn of the 1980s/90s.

The period of the first cycle can be described through the logistic function of A, while taking into account the observations of S. Ludtorp and S.

Wanhill concerning the division of functions describing the cycle. The logistic function of A (y_t^A) is presented in formula 1 (in which t is the number of the period, wherein 1945 is period 1).

$$y_t^A = \frac{762627,9}{1 + 20,71 \cdot e^{-0,1786t}}$$

(1)

Knowing, therefore, that the logistic function of A peaks at 762,628 tourists, we can analytically mark various phases of the R.W. Butler cycle. Though it may not be complicated to mark out various phases, we ought to firmly state outright that the division is no more than a hypothesis which can be verified by assigning various phases to historical events from the periods involved, and most frequently to the break between the two periods.

Thus, the cycle was broken down in the period we are calling "A" in the following manner:

a) the exploration phase is the period from the start of tourism in the mine to 1947 (the available sources do not mention heavy tourist activity prior to World War II – we might therefore suppose that it was insignificant, and that the war caused it to vanish entirely; it is only with the post-war tourist traffic statistics that increased numbers are noted, i.e. after 1947).

b) the involvement phase is probably the period from 1947-1951/1953 (increased interest in a tourist path for the mine is observable from 1947, though some researchers note that equipment to ensure the secure transport of tourists was not applied in this period, and some even claim that the site was not prepared for particularly substantial numbers of tourists [Rączkowska, 2003, pp. 81-102]);

c) the development phase occurred from 1951/1953-1967 (the development phase was tied to state grants the mine received during this period; the period of renovating the tourist transportation equipment caused a temporary drop in the number of visitors, but shortly thereafter the number of tourists began to sharply rise once more);

d) the consolidation phase occurred from 1967-1972 (the growth in the number of the visitors to the site continued, but we ought to recall that the fragmentary data on foreign tourists prove that they played a significantly greater role than in the previous phase (mainly from the USSR and Czechoslovakia); in 1969 80,000 were noted, while the previous statistic, from 1955, registered 4,600 [Rączkowska, 2003, pp. 81-102];

e) the stagnation phase covers 1972-1978 (during this period growth in numbers of visitors ceased, and the traffic fluctuated greatly in the consecutive years; this may be as a result of attempts to increase the tourist traffic);

f)   the decline phase occurred from 1978-1981/1991 (a period which saw a definitive reduction in visitors, to around 300,000; obviously, the main cause of this situation was the introduction of Martial Law and the society's difficult socio-economic position).

The above division is merely a hypothesis based on some historical facts and a quantitative curve analysis of development. It is possible, however, to pose various questions about how the situation would have differed had the changes due to Martial Law not occurred. What if the social situation had not worsened?

It would seem, however, that the tourist exhibitions and the state of the tourist infrastructure at the time would have led to a further drop in numbers of tourists regardless, down to 300,000 visitors a year (though this level would have been reached significantly later).

We ought to note that tourism was regenerated after 1982. At this point the numbers of visitors rose sharply for the next four years, and in 1986 another significant drop in visitor numbers was noted, and was not to be improved in the years immediately following. According to the historical sources natural forces caused the degradation of the access roads to the Salt Mine in Wieliczka in 1992 (i.e. uncontrolled water leakage). The mine's closure to visitors for a period of several months not only caused the annual number of people visiting the route to drop (once more) to around 300,000 people; it also led to the introduction of changes to the tourist exhibition, resulting in increased interest in the years that followed.

Analyzing the period of the mine's operations after 1991, it would seem that the interest in the exhibition grew with every consecutive year, ultimately exceeding one million tourists annually in recent years. Applying prognostic methods of time analogies, we noted that the logistic function of A estimated for the first period could describe the course of the phenomena in the second period. Taking into account the new base of the cycle equal to 300,000 tourists, the formula for the logistic function of B is the following:

$$y_t^B = 300{,}000 + \frac{762{,}627.9}{1 + 20.71 \cdot e^{-0.1786\,(t-36)}}$$

(2)

There is no way to establish the course the function will take in the full B period – as S. Lundtorp and S. Wanhill have proven, it can be fully described only after the conclusion of the cycle. We can see, however, a similarity in the dynamics of the growth of numbers of tourists. It would also seem accurate to say that hypotheses of the capacity to continue the present cycle (halted because of external events) should not be discarded (fig. 3).
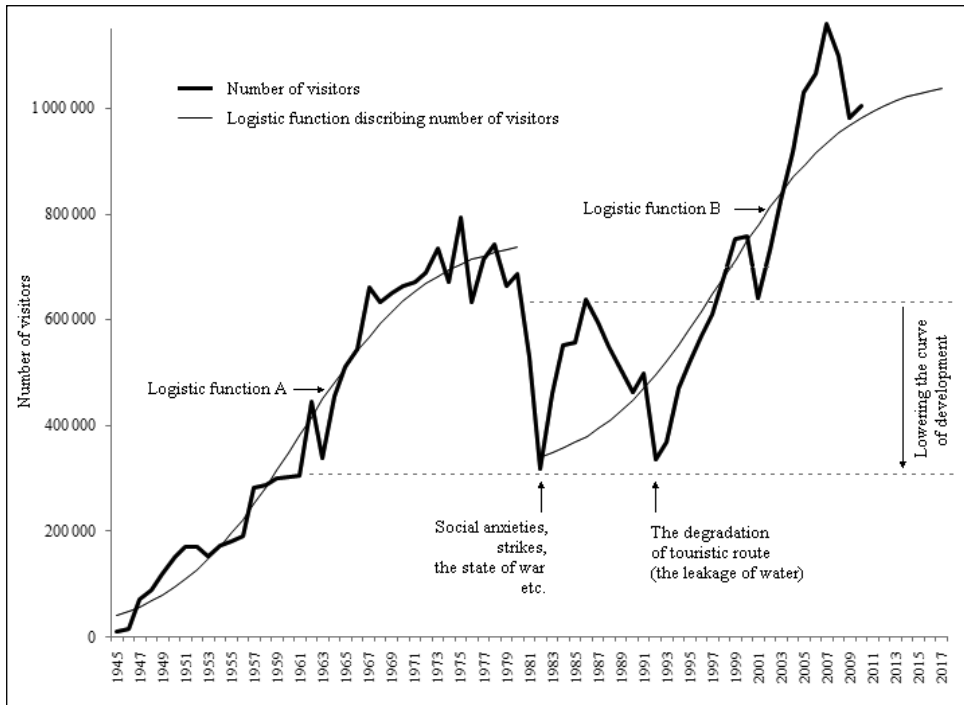
Figure 3. Two cycles of development for the Salt Mine in Wieliczka
Source: own calculations.

Such an explanation of the course of the development curve coincides with the hypothesis S. Corak, which describes the case of the Croatian health spa in Opatija, where the effect of the Butler cycle has been documented over the course of the last century, or more accurately, three full cycles adding up to one large cycle of development for the area [Corak, 2006, pp. 271-287]. Between these cycles there were periods of several years when the area was entirely abandoned by tourists, or when there were very few. These were the periods of World War I and II, and the period of the economic transformation of the 1990s. Opatija also shows a significant similarity in terms of the continuing growth dynamic of visitors in the consecutive cycles.

A. Kapczyński and A. R. Szromek draw similar conclusions in terms of the possible continuation of the cycle, noting a similar regularity with regards to the development curve of Polish spa towns [Kapczyński, Szromek, 2008, pp. 1035-1037].

We ought to note, however, that it is extremely difficult to prove whether we should allow the defined course of the phenomenon to indicate the continuation of the cycle to date, or whether we are dealing with a new

evolutionary cycle while the evolution process is still underway. Certain circumstances verifying the set hypotheses can, however, result from an analysis of the impact of events that have disrupted the progress of the cycle.

Therefore – to return to the development of the tourist traffic in the Salt Mine in Wieliczka – we should stress that the first of two key events that took place in the period under analysis was an external factor, in that the events were not strictly tied to the tourist object (route). Here we have in mind the armed events connected with the Martial Law period and the destabilization of the country in 1982.

The second event, on the other hand, was an internal one, and was directly linked with the tourist route, or rather with access to it. This was the ecological catastrophe caused by the inflow of water in 1992, which caused some of the deposits to be damaged, and cut off access to the route.

A signal that heralded the beginning of a new cycle was the quality changes in the form of the product structure changes, and the consequent changes in the type of visitors, their needs etc. If essential changes had not been made to the product, it would have been more likely that the previous phases of the development cycle to date would have been continued.

It seems imperative to accept the hypothesis that the cycle to date should be continued in circumstances where external factors intervene, such as military activities in the country of the tourist site.[3] These often introduce no changes to the product as such (here: the tourist route), they merely restrict our capacity to safely participate in tourism. This is why when the external factor ceases to act tourist traffic can return to the phase where it was before the factor came to exist (particularly when the tourist area was not in the factor's immediate range of repercussion).

Other consequences may accompany internal factors (here: damage to the path), as they often compel the form of the product to be changed (e.g. through its expansion), which might mean the target group becomes different from before, or other needs might be satisfied, thus attracting new visitors, in addition to those who had previously used the product.

An observation of the time spread of the numbers of visitors to the tourist route at the Salt Mine in Wieliczka does not presently allow us to verify these hypotheses because of the complexity of the process, and also because of the existence of both sorts of factors in a short time period. Nonetheless, the break in the trend in the years 1986-1988 and the probable consequences of an attempt to increase interest are visible in 1990-1991, perhaps

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[3]   This issue has been the subject of several articles, which have surveyed it both in terms of the negative effects of armed conflicts on tourist traffic (e.g. limiting safety in travelling and staying in the tourist area), and also in terms of the significant increase in the tourist traffic in the military area after the armed conflict ceased. [Weaver, 2000, pp. 151-161].

suggesting a continuation of the previous cycle and the phase of decline, which was to flower into a rejuvenation phase. Further observation of the changes made was not, of course, feasible, owing to the events that damaged some deposits. Paradoxically, this fact might have resulted in more radical changes to the form of the product (the route), thus initiating a new cycle, whose consecutive phases are currently being recorded.

It is presently impossible to identify the current phase of the site's development; for although contemporary researchers list many indicators that characterize the various phases of the cycle of tourist area development [e.g. Buhalis, 2000, pp. 97-116; Zajadacz, Śniadek, 2011, p. 1031; Szromek, 2010, p. 325], they allow us to define a phase only from the perspective of the whole cycle. It seems, however, that the tourist paths in the Wieliczka Salt Mine will require further undertakings to stimulate further tourism development (such as exploiting the opportunities offered by mass events, such as the EURO 2012 European Championships in soccer).

Summary

The Salt Mine in Wieliczka is doubtless one of the most attractive tourist sites in Poland. It seems as though the economic and cultural virtues of this site require no emphasis, nor even the formulation of arguments. A rich history, educational and cultural virtues, and a special climate are only some of the attributes that fill the description of the tourism significance of this attraction. The fact that it draws around one million tourists a year stands as further proof of the enormous significance the Salt Mine has in developing tourism in Poland.

The stormy history of the mine's tourist route prove that achieving its present socio-economic significance has been tied to many dramatic moments and difficult changes. A review of the events associated with the mine and the course of the symptomatic curve of its tourism development make us prone to reflect that, from the perspective of the history of the mine's tourism activities to date, the difficulties it has encountered were transitional. It even seems that the occurrence of some twists of fate (e.g. water leakage cutting off access to the tourist path) forced inevitable development changes in the mine. They facilitated the continuation of tourism development at the site.

Observations of the shape of the curve of the numbers of visitors to the tourist path in the mine indicate the possibility of the curve stabilizing at a level of one million visitors (though the present tourist capacity of the attraction is 1.3 million tourists). This is no more than a prognosis resulting

from the course of the phenomena to date. The further development of the tourist route of the Salt Mine in Wieliczka will depend on many factors. Among these will surely be activities promoting the existing tourist routes, as well as the impact of a creative approach to the shaping of the tourism product of the mine. Examples of such undertakings are already visible, such as the use of an exhibition of past set designs for popular films (including *Seksmisja*).

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THE TOURISM LANDSCAPE
AND TOURIST SPACE OF THE CITY

*Bogdan Włodarczyk**

Abstract: The author attempts to define the term 'tourism landscape.' It is treated as an important attribute of tourism space, therefore, apart from its definition, the author presents its characteristic features and various types of such spaces with differing tourism landscapes. The landscapes of tourism space are treated not only as tourism assets or attractions, but also as the consequences of tourism activity in the natural and cultural environment. The article regards tourist space, understood as a part of geographical space in which the phenomenon of tourist traffic is observed. The subject of this space is a human being called the tourist, and the working elements of the tourist infrastructure it contains define its character. Tourist space may be studied on several cognitive planes, including the following: the system plane, which treats the space and its elements as a system; the morphological plane, describing its structure and the relations between its components; the functional plane, based primarily on the studies of tourist traffic; the metaphorical plane, largely referring to the non-material elements of space; and the landscape plane, which is a combination of the afore-mentioned planes. It should be remembered, however, that only comprehensive studies, taking into consideration some or all of the listed planes, lead to the full understanding of the phenomenon. This paper was prepared by using: Włodarczyk B. (2009b), *Krajobrazy przestrzeni turystycznej* [*The landscapes of tourism space*], [in:] Turyzm, 19 (1-2): 89-97 (in Polish and English), and B. Włodarczyk (2011), *Miasto i przestrzeń turystyczna* [*The city and tourism space*], [in:] Księga jubileuszowa w 70. rocznicę urodzin Profesora Stanisława Liszewskiego, t. *Turystyka*, pp. 103-120 (in Polish).

Key words: geographical space, tourism space, landscape, tourism landscape, landscape of tourism space, city, urban space, urban tourist space.

Introduction

In geography, landscape is identified mainly with natural elements (geo-complexes). Such a perception (reading) of landscape has been popular ever since the notion was introduced into geography in 1806 by Alexander Humboldt [Kowalczyk, 2007]. Therefore it mainly interested physical geographers who stressed connections with the natural environment and its

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processes, and rarely focused on the relation between the natural environment and human being [e.g. Richling and Solon, 1996, 2002; Ostaszewska, 2002; Pietrzak, 2007]. This nature-oriented approach was counterbalanced by the notion of cultural landscape, treated as a combination of natural elements and (perhaps above all) the consequences of human activity in nature [Kowalczyk, 2007]. The aim of this article is not to discuss the meaning of the term 'landscape', but to answer the question of whether tourism activity can cause changes in the landscape significant enough for it to be called a 'tourism landscape'. If so, what makes it different and what are its characteristic features.

Generally speaking, dictionaries suggest two meanings of the term 'landscape'. The first is literal where landscape is understood as a set of natural and anthropogenic features characteristic of a given area. In other words, landscape is everything we see when looking at an area, i.e. a part of the earth as seen from a given position [Szymczak, 1978; Bańko, 2007]. The other is metaphorical, where landscape is defined as a set of factors creating a given phenomenon, e.g. the political situation forms a political landscape, cultural life – cultural landscape, etc. [Bańko, 2007].

In an analysis of 'tourism landscape' both approaches can be used, but in this article the author will consider only the first literal meaning ignoring the metaphorical.

The briefest, and at the same time the most accurate, definition of landscape is that proposed by Bogdanowski [1976] who believes that **landscape is a combination of natural and cultural elements forming the 'physiognomy' of the environment (Earth's surface)**. Adopting this definition for discussion, we may also accept the basic classification of landscapes by the same author:

– **primary landscape** – capable of self-regulation, its biological balance undisturbed by man;
– **natural landscape** – partly capable of self-regulation, but containing no important spatial elements introduced as a result of human activity;
– **cultural landscape** – showing an impaired capability to self-regulate and requiring protection; it is strongly influenced by extensive human activity [see also Bogdanowski et al, 1979].

According to this classification, a 'tourism landscape' can be regarded as a type, or as a part of a cultural landscape. In contrast to 'tourism space', delimited by the presence of tourism, a 'tourism landscape' is a result of various human activities within this space and is perceived in terms of the changes to the natural landscape caused by these activities. A 'tourism landscape' is not usually or easily described in isolation. In

order to do so, we should need to identify the space where the elements which created it clearly dominate over other components in a cultural landscape.

A question arises as to whether we can talk about a 'tourism landscape' at all. A discussion of landscape terminology, conducted by Plit, shows that authors often excessively form new and questionable terms (e.g. 'sound' landscapes) [Plit, 2007].

Table 1. Types of landscape according to various criteria

Criterion	Type of landscape
Origins	– natural – anthropogenic
Topography	– mountainous – upland – lowland
Natural environment	– forest – marsh – desert – lake – coast – …
Development	– rural – urban – rural-urban fringe
Function of geographical space (type of human activity in space)	– agricultural – industrial – **tourism** – …

Source: own elaboration.

The criteria in Table 1 show that a tourism landscape can be treated as one of the types identified on the basis of the main function of a geographical space, measured by the character and intensity of human activity within this space. Thus, using the term 'tourism landscape' seems justified.

The Concept of 'Tourism Landscape'

The term 'tourism landscape' is virtually unused in tourism geography, and landscape itself is treated as something that can interest tourists rather than something that can appear as a result of their direct or indirect activity. The terms used most frequently are the 'tourism use of landscape', the

'tourism attractiveness of landscape' [Bezkowska, 2003; Kowalczyk, 2007], 'landscape as an element of the tourism attractiveness of an area' [Meyer, 2008], 'landscape aesthetics in the context of tourism asset evaluation' [Bezkowska, 2005] or the 'tourist perception of landscape' [Kowalczyk, 1992a, 1992b]. There are also many publications on regional architecture as an element of the cultural landscape of tourism destinations [e.g. Chylińska, 2008; Suchodolski, 2008]. Only in the literature in English do we come across the term *tourismscape*, relating to the *actor-network* concept which is closer to the assumptions under-lying tourism space than to the classical under-standing of the term 'landscape', and largely fits its metaphorical meaning [Van der Duim, 2007].

Let us assume then that **a 'tourism landscape' is the physiognomy of 'tourism space', a combination of natural and cultural elements as well as of the consequences of tourism activity within this space**. This is a general definition and it does not define the balance between the kinds of spaces which create a landscape. If we assume that a tourism landscape can be described as a particular third dimension of tourism space, then we can also speak about a **tourism space landscape(s)** [Włodarczyk, 2009a, 2009b]. It must be pointed out that we do not mean here only those landscapes perceived or 'consumed' by a tourist, but also those which are a visible consequence of this consumption.

In the first case (landscapes 'consumed' by a tourist), they contain elements which for some reason are interesting for a tourist (natural environment, flora, climate, historical monuments, and less often tourism infrastructure). This kind of landscape, perceived subjectively, can be called a 'landscape of tourism assets (attractions)' and it is typical of exploration, assimilation and, in part, penetration tourism spaces. In the other case we are dealing with landscapes resulting from tourist 'consumption'. In this situation the basic objective delimiting factors are the consequences of tourism-related activity, and its intensity and character point to those spaces of which they are typical (a part of penetration space, and colonization and urbanization spaces). This kind of landscape can be called a 'tourism development landscape'. Because both the subjective and the objective factors are taken into consideration, this division into two kinds of landscapes is not contradictory.

Therefore, we should perhaps present here a definition of tourism activity as an element which helps produce a tourism landscape according to the second approach. In order to make the terminology we use more precise, let us assume the following:

- **Tourism activity *sensu largo*** is the ability to be a tourist, to undertake tourism, to be involved in tourism, working on behalf of tourism. Tourism activity *sensu largo* is not synonymous with actual tourism.

- **Tourism activity *sensu stricto*** is expressed through active tourism (demanding some involvement e.g. specialised tourism, recreation on summer plots, etc.) [Włodarczyk, 1999, 2009a].
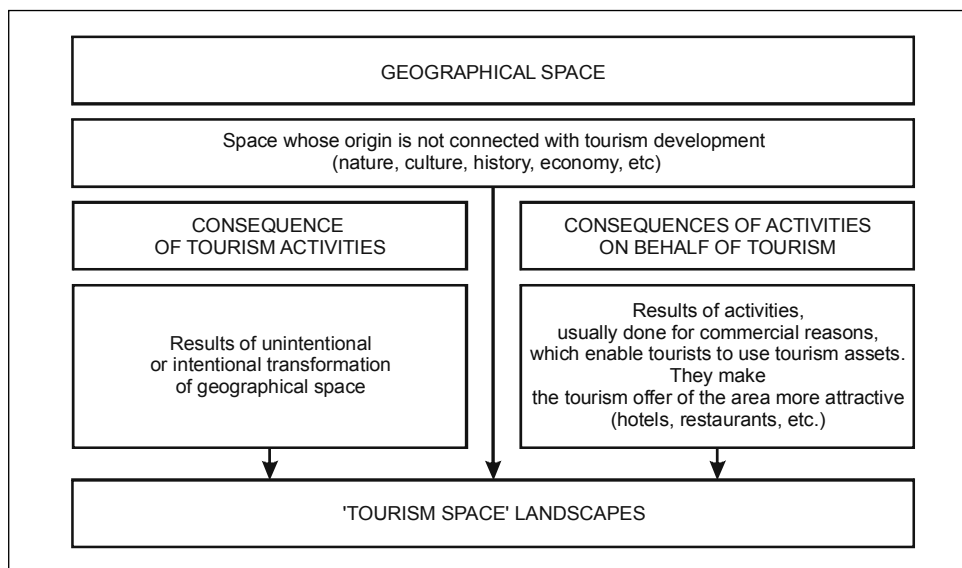
Figure 1. Elements producing 'tourism space' landscapes
Source: own elaboration.

The requirements of a tourism activity lead to certain events which lead to changes in the space in which the activity takes place. These may cause an unintentional transformation of geographical space, a consequence of the kind of tourism, or they may be an intentional transformation enabling favoured tourism activities to take place [Włodarczyk, 1999, 2009]. Thus, the basic components of 'tourism space' landscapes are elements of the geographical environment (both natural and anthropogenic), the consequences of tourism activities and activities on behalf of tourism.

Tourism activity in space can be divided in three ways:
- Unintentional transformation of geographical space – including tourism activities which do not result in permanent elements of tourism development, but are easily noticeable in the natural environment (paths, roads, tourism trails). These consequences are also evidence of explorative and penetrative activity.
- Intentional transformation of geographical space – including all individual or group activities which aim at adjusting geographical space to recreational needs (e.g. permanent elements of tourism development, tourism settlement – second homes). These activities leave per-

manent and visible traces in space and may determine the character of a tourism landscape. This kind of activity is typical of tourism colonization space.

– Activities on behalf of tourism are all those individual and group activities (apart from actual tourists themselves) which adjust the environment (geographical space) to the needs of tourism, or which facilitate tourism in a given area in order to achieve preplanned social or economic goals.

Activities of this kind usually determine the extent to which a natural landscape is transformed and seriously affect the cultural landscape. The 'tourism landscape' they produce is a clearly different and distinctive part of the cultural landscape. The consequences of this kind of activity, of varying intensity and nature, can be observed in all types of 'tourism space' (except exploration). They are most pronounced in tourism colonization space (colonization *for* tourists), urbanization space and some parts of tourism penetration space [Włodarczyk, 1999, 2006, 2007, 2009a, 2009b].

The Features of a 'Tourism Landscape'

Assuming that 'tourism space' is a particular kind, or part of, a cultural landscape, we may point to a number of characteristic features:

• it is the third dimension (physiognomy) of 'tourism space.' In other words, it is in the appearance of this space that we can easily identify the consequences (traces) of tourism activity (this space has a particular physiognomy which can be presented on an illustration or photograph). Due to the fact that 'tourism space' is diversified, we may talk about different kinds of 'tourism landscapes' ('tourism space' landscapes). They occupy a part of space and can be presented on a map;

• it shows the development of a given function in geographical space (in this case – the tourism function);

• it is created as a result of removing or (more often) adding elements to the 'pre-tourism' landscape (both natural and cultural) which did not result from the tourism function or activity, which thus becomes another 'layer' of the cultural landscape;

• it is not only consequences but also the co-occurrence of phenomena, thus it cannot be treated as a static and primarily material element (e.g. only from a tourism investment perspective). The tourist becomes an important element without which it is difficult to imagine a tourism landscape. It must also be stressed that the earlier ('non-tourism') components of landscape become a part of it, together with the conse-

quences of tourism activity. In other words, it is a dynamic system and its functioning depends on the relations between components and on the main processes (including the nature of human activity);

• it is relative, i.e. it is a consequence of the relation between the tourist and geographical space (geographical environment), both natural and cultural;

• it undergoes both evolutionary and revolutionary transformation, so it can be said to have its own history;

• it is often perceived through symbols, impressions or values (e.g. Kraków is identified with Wawel, Paris – with the Eiffel Tower, Śnieżka – with the 'flying saucer' refuge, Zakopane – Giewont, Gubałówka and Morskie Oko, Białowieska Forest – bison).

Landscape Types in the Context of Types of 'Tourism Space'

The basis for further discussion will be the first of the features listed above ('tourism landscape' as the physiognomy of tourism space). This physiognomy is affected by both the intensity and the character of tourism investment and of actual tourism, and provides the basis of the tourism space classification:

Type I – with little tourism investment and a low intensity of tourism use. This is reflected in the lack of large building complexes or tourism infrastructure. We can give the example of higher mountains where tourism investment is limited to shelters and tourism trails, and tourism activity (*sensu stricto*) is limited to exploration and penetration (Photo 1 and 2). They are attractive landscapes due to their naturalness and specificity. Areas of this type are often tourism *subecumene* and the **tourism landscape** can be described as **primary**.

Type II – with large tourism investment but low intensity of tourism use. They may be landscapes of ageing or old, often 'abandoned', tourism spaces (for example former Olympic centres where huge investments were made in sports and tourism facilities, although after the Games they lost value dramatically, leading to closure or even destruction) [Alejziak, 2008].

Type III – with large tourism investment and very intensive tourism use. They usually occur in areas where tourism 'absorptiveness' has evidently been exceeded, and tourism infrastructure has dominated the natural components. They are very often **disharmonious tourism landscapes** with clear signs of damage or even degradation. Such landscapes are quite common in spaces considered to be the most attractive from a tour-

ism point of view. They are also usually areas of **tourism 'monoculture'** (the domination of one or several related forms of tourism), mainly recreational. We can give here examples of the coastal landscapes of Languedoc, Florida, California, South Africa, Brazil, or the Golden Coast in Australia. This type of landscape is less common in mountain areas.

Type IV – with little investment but relatively intensive tourism use. An example of such a landscape can be a national park (especially the most attractive) where despite limitations on building a tourism infrastructure, there are clear negative signs of excessive exploitation of these areas. A similar type of landscape can be found in ski resorts where investment is limited to ski lifts, slopes, and a few hotels and restaurants while the consequences of intensive tourism activity during the winter (visible mainly outside the skiing season) are clearly negative, particularly for the natural components of the landscape.

Type V – with moderate investment and tourism use which does not lead to natural degradation. The tourism infrastructure of such a space is usually based on local (historical) forms of building or makes use of earlier investment. Tourism observed in this type of landscape is not invasive and is limited mainly to the penetration of the area by means of the existing network of tourism trails. This type of landscape can be called a **sustainable** or **harmonious tourism landscape**.

The example which can be given here is the tourism landscape of the Międzygórze resort in the Śnieżnik Mountains, where except for one state 'worker's holiday fund' (FWP) building, the architecture fits in with the 19th century historical tradition, and the seasonal, quite intensive tourism is channelled through a well-marked and relatively dense network of walking, cycling and skiing trails. Other examples are areas of tourism assimilation and colonization, for instance in the Massif Central in France, where the majority of second homes are former homesteads preserved in an unchanged regional style.

The types of space presented above (and at the same time the types of landscapes observed in them) may be continuous (i.e. pass from one into another), and the borders between them are often blurred.

The City as Tourist Space

Travellers have always been interested in cities. People migrated there for commercial, political or religious reasons, but also in order to satisfy their curiosity and enjoy themselves, as cities differed so much from the surrounding rural areas; they contained many elements of cultural heritage, as well as more developed infrastructure (Benevolo, 1995; Liszewski, Maik,

2000). The theory of tourist space has already been widely discussed in Polish academic publications [Liszewski, 1995; Liszewski, Bachvarow 1998; Włodarczyk, 2006, 2007, 2009a]. Polish researchers are also interested in urban tourism, which is a part of general tourist space (e.g. Liszewski, 1999, 2005, 2007; Jażdżewska, 2008; Matczak, 2008].

The tourist space around large cities has already been studied in detail many times, but the city itself within its borders (e.g. administrative) is rarely viewed in the model perspective, and the presented conceptions are rather functional descriptions. One of the model approaches to the urban tourist space is S. Liszewski's [1999] conception. It largely refers to the general conception of tourist space, presented by the same author earlier [Liszewski, 1995]. This conception may be used for tourist modeling of individual fragments of the city. Analysing the city as an object of tourism geography studies, S. Liszewski [2007, 2008] clearly points to their spatial aspect and, like in the case of a general conception, he identifies the tourist exploration, penetration, colonization, urbanization and assimilation spaces within the city.

Empirical studies regarding the space of selected large European cities were also conducted by L. Butowski [1996], who identified a number of functional zones related to tourist service within the urban space.

A slightly different model of the urban tourist space was presented by French tourism geographers, J.M. Lozato-Giotart and G. Balfet [2007]. Using the example of Paris, they presented a multipolar model of urban tourist space, pointing clearly to the areas of tourist traffic concentration, connected with particular tourist attractions, which are at the same time the symbols of this space (the Notre Dame Cathedral, the G. Pompidou Centre, the Eiffel Tower or the Montmartre). The authors of this conception also point to the characteristic zonal localization of these attractions, depending on their accessibility from the centre of the system, which in this case forms the "golden triangle". Outside the city limits there are other symbols directly associated with Paris, such as Euro Disneyland or Versailles.

However, regardless of the assumptions and purpose of the discussion, we may assume that the character of the urban tourist space is determined by the following (Fig. 2):
– its spatial layout, morphology, architectural physiognomy;
– different types of tourist attractions, individual attractions, areas (complexes of buildings, parks, squares), or linear attractions (streets, tourist trails), regardless of whether they are natural or cultural;
– tourist infrastructure (hotels, restaurants, conference and shopping centres), additional and para-tourist facilities;
– other elements giving the space the air of originality (weather, rivers, land relief, borders, etc.).

1 – city limits
2 – spatial layout of the city
3 – single attractions (individual build-
ings)
4 – linear attractions (tourist trails, im-
portant streets, etc.)
5 – area attractions (parks, architectur-
al complexes, districts)
6 – elements of tourist infrastructure
7 – barriers (rivers, borders, etc.)
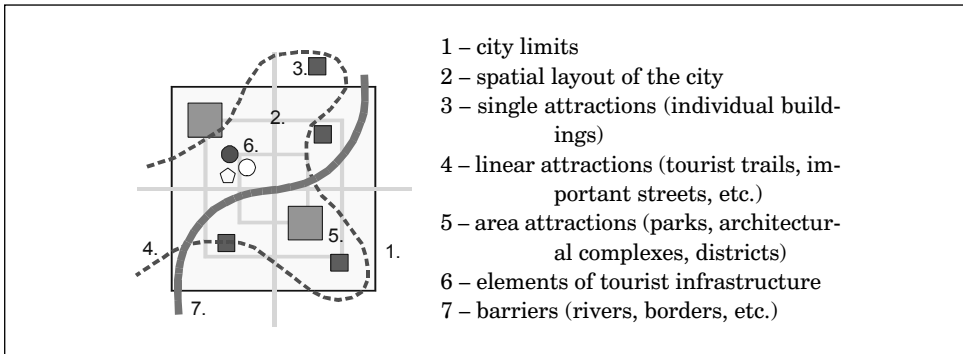
Figure 2. Elements creating the urban tourist space
Source: author's own elaboration.

A	B	C	D
non-touristic city	continuous urban tourist space	irregular (perforated) urban tourist space	city with a few enclaves of tourist space (insular space)
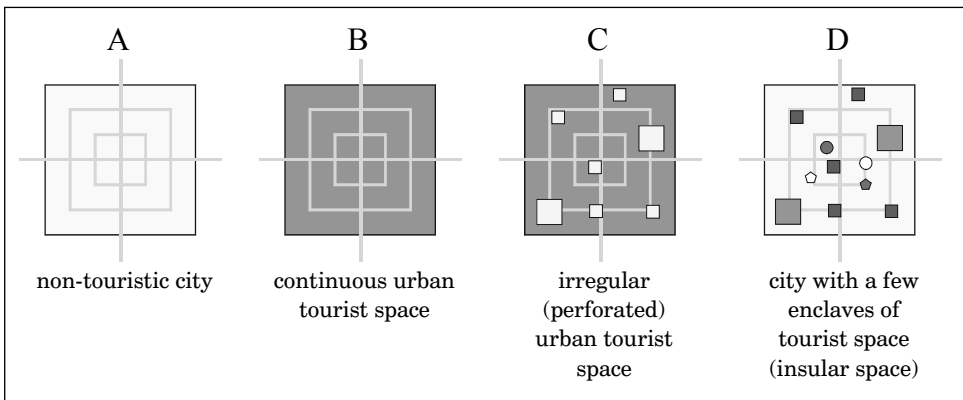
Figure 3. Different types of cities depending on the character of the urban tourist space
Source: author's own elaboration.

Analysing urban space from the theoretical point of view, we may assume that there are four types of cities, identified on the basis of the relation between its non-tourist and tourist part. Extreme cases are the cities devoid of tourist space (theoretically, it is possible in the case of cities-dormitories or cities which for some reason are inaccessible to tourists) or cities which are all tourist spaces, such as Kazimierz Dolny on the Vistula River (Fig. 3A and B). They include cities with perforated (irregular) tourist space, where only some areas are not accessible or attractive to tourists, or cities with insular tourist space, where only some places attract the attention of the visitors (Fig. 3C and D).

The urban tourist space can be classified according to various criteria, depending on the current research or didactic needs. In most cases, the ur-

ban tourist space can be presented in the form of simple graphs (Fig. 4-6). The author believes that some of them may be also used for presenting other "non-urban" types of tourist space.

A	B	C	D
City with one attraction situated centrally in tourist space	City with polycentric tourist space	City with band-nodal tourist space layout	City with attractions dispersed in tourist space
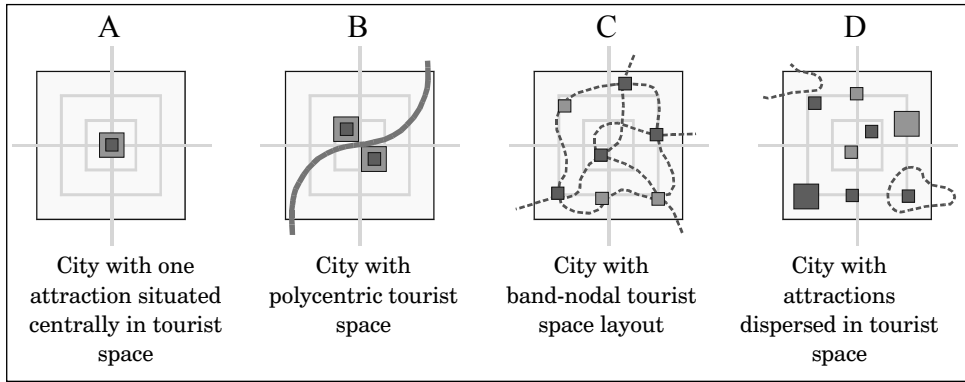
Figure 4. Selected types of the urban tourist space, depending on the number, character and mutual location of its elements

Source: author's own elaboration.

A – central location,
B – peripheral location
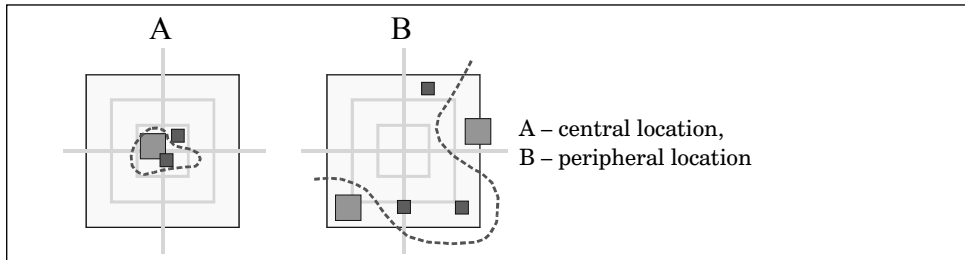
Figure 5. Different types of the urban tourist space, depending on the location of tourist attractions

Source: author's own elaboration.

A – with one predominating attraction
B – with several equivalent attractions
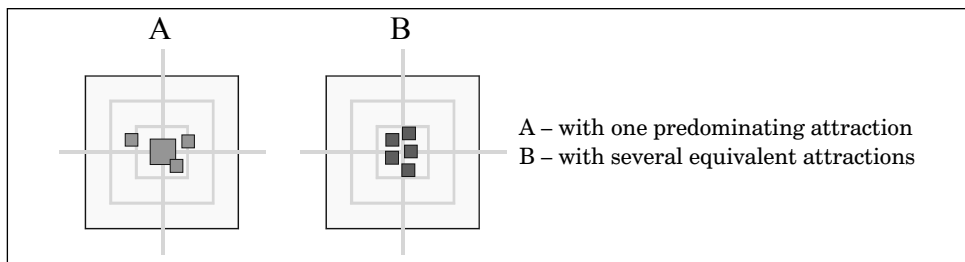
Figure 6. Different types of the urban tourist space, depending on the relation between tourist attractions

Source: author's own elaboration.

The Tourist Urban Landscape

The return of comprehensive landscape studies in contemporary geography should also concern tourism geography, especially the studies of tourist space, which creates particular cultural landscapes. Let us assume for the purposes of this article that the urban tourist landscape is the physiognomy of the urban tourist space, which is a combination of natural and cultural elements, as well as the effects of tourist's activity in this space. The notion suggested above is general and does not define the proportions between individual elements creating a landscape. If we assume that a tourist landscape can be described as a particular third dimension of tourist space, we may also talk about a tourist space landscape (landscapes) [Włodarczyk, 2009a, 2009b]. At this point it must be stressed that the landscapes are not only those which are perceived or "consumed" by the tourist, but also those which are visible effects of this "consumption".

In the first case (landscapes which are "consumed" by the tourist), the landscapes gather elements, which are interesting to the tourist for some reason (land relief and cover, flora, climate, historical monuments, rarely tourist infrastructure). Such a subjectively perceived landscape can be called the landscape of tourist assets (attractions) and it is typical of the tourist exploration, assimilation and partly penetration space. This type of tourist landscape is characteristic of cities with a large number of cultural heritage elements, i.e. tourist centers, centers regarded as architectural reserves or historical monuments, as well as cities entered on the UNESCO list, perceived through individual or sets of attractions. The subjective perception of such landscapes may be presented by means of the method used for creating city panoramas, only keeping the basic proportions and highlighting the dominating elements (architectural dominants) or those considered to be particularly significant. Objectively, urban landscape (including the tourist urban landscape) may be reconstructed using the method of urban cross-section or panoramic photography.

In the second case we deal with landscapes which are the effect of tourist "consumption". Here, the basic objective delimitation factors are the results of tourist activity, and their intensity and character point to the types of space which they represent (a part of the penetration space, colonization and urbanization space). This type of urban landscape may be called tourist development landscape and it is the effect of activity for the benefit of the tourist rather than the effect of tourists' activity. In this case we can talk about tourist colonization "for the tourists" rather than "by the tourists". The cities of which this type of landscape seems to be characteristic are huge centers of business tourism (New York, Tokyo, Hong Kong), conference tourism (Berlin, Strasburg, Brussels), seaside resorts (Durban, Nice) or spas (Polanica, Krynica, Spa).

A – mainly tourist attractions, B – tourist attractions and infrastructure,
C – mainly tourist infrastructure
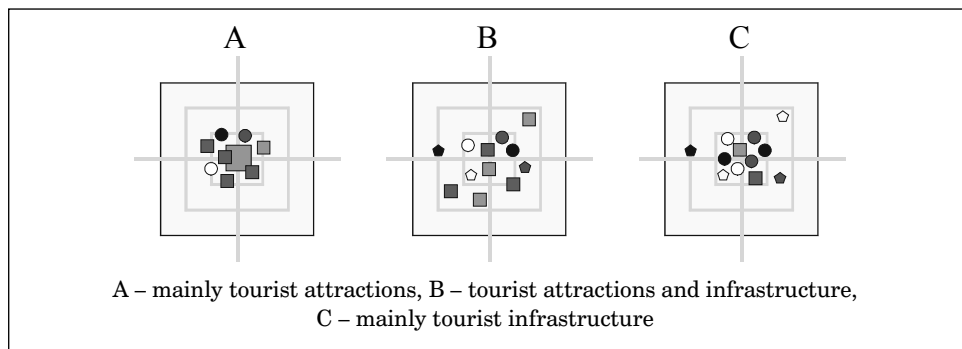
Figure 7. Types of the urban tourist space, depending on the factors determining its character
Source: author's own elaboration.

Due to the fact that the delimitation included both the subjective and the objective factors, the division is not disjoint. Therefore, in many cases, the type of the tourist space of the city, and at the same time its tourist landscape, are determined by both the attractions and the tourist infrastructure, though in different proportions (Fig. 7.) [Jansen-Verbeke, 2011; Włodarczyk, 2011].

Metaphorical Approach to the Urban Landscape and the Urban Tourist Space

The issues related to the urban tourist landscape presented above refer to the projections of individual sites and objects, which are realistic symbols of the city. The urban tourist space, however, is not only the site together with its objects, but also, or perhaps first of all, the events (not necessarily realistic) which result from the relation between human being and the elements of the urban space, building a unique atmosphere at a given place and time, which cannot be found anywhere else.

This particular atmosphere of the city is often built with the help of books, films, paintings or music, where apart from planned and organized events, such as "Bloomsday" in Dublin, based on J. Joyce's *Ulysses*, we more and more often deal with individual (not organized) exploration of the space, in which tourists move following the "traces" of the characters from famous novels, often detective or adventure stories. Sightseeing in the cities where the action of best-sellers is set is very popular; such tourist offers often considerably modify the plot, but realistically present the modern times instead. Good foreign examples include Paris with *DaVinci Code* or Rome

with *Angels and Demons* by D. Brown, Moscow with *The Master and Margarita* by M. Bulgakov, Barcelona with *City outside Time (La Ciudad Sin Tiempo)* by E.Moriel, or *The Shadow of the Wind* by C.R.Zafon. Polish examples include Wrocław with Eberhard Mock, the hero of a thriller series by M. Krajewski or the cities of Lower Silesia with Reynevan from Bielawa, or the hero of *Trylogia husycka* by A. Sapkowski. At the same time, there are many tourist guidebooks on the market, which trace the adventures of the characters of the novels mentioned above and use considerable fragments of the original books, comparing the literary descriptions to the actual situation, sometimes completing, up-dating or correcting the information provided by the writers [Paziński, 2008; Mittelbach, 2006; Burger, Schwartz, 2006].

A similar chance can be sought in Lodz, a city which offers the tourists and inhabitants a possibility to follow the footsteps of Karol Borowiecki, one of the main characters of W. Reymont's *Ziemia obiecana (The Promised Land)* written in 1899. It was very successfully filmed in 1975 by A. Wajda. Also the sightseeing in the Lisbon district of Alfama may be inspired by the film directed by W. Wenders, entitled *Lisbon Story*. Cities more and more often "play" the main role in popular films and series, attracting the attention of tourists and in this way generating more income from tourist activity. In recent years, in Poland such "film careers" have been made by Krakow, Sandomierz or Supraśl [Krakowiak, Włodarczyk, 2009]. The examples quoted above show that tourist space does not have to be only an expression of material heritage or tourist infrastructure. An equally important component is the atmosphere of the city, created in order to make the tourists feel comfortable in this space, to put them at least a little in the centre of the action and let them experience the city which turns out to be quite different from the one presented in guidebooks.

Conclusions

Similar to 'tourism space', landscapes connected directly are the consequence of changes occurring in geographical space. The changes can be both structural and functional and the landscapes observed in 'tourism space' may be the result of transformations of both the natural environment and as part of a particular continuum of cultural landscape.

If we assume that the use of the term 'tourism landscape' is justified, then we should ask some questions to encourage further research:

• What elements form a 'tourism landscape'? Are they only the consequences of tourism activity or also 'non-tourism' elements variously related to the tourist, and new, usually unfamiliar, components of the tourism infrastructure?

- What kind of relations are they and how strongly do they affect the condition and character of a landscape?
- What is the role of the 'tradition of the site' (*tradycja miejsca*) and can a 'tourism landscape' reflect this tradition?
- What is associated with a given 'tourism landscape' and why?
- How should a 'tourism landscape' be studied?

We cannot always find clear answers to these and many other questions. Therefore, it seems important to conduct wide-ranging research and consider various approaches and ideas in order to explain the essence, structure and characteristic features of tourism spaces and their landscapes, as well as their development factors.

The issues presented in the paper bring several basic conclusions:

– the urban tourist space is so diversified that it comes in a number of types, using a classification based on different qualities;
– understanding and studying the urban tourist space may differ, starting from the identification of functions, through the description of morphology, landscape, ending with metaphorical analyses.

It is worth stressing that some conceptions of the urban tourist space classification, presented in the article, may be well used for other, not necessarily typically urban tourist spaces.

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VALUE CO-CREATION AND TOURISM DESTINATION COMPETITIVENESS

*Michał Żemła**

Abstract: Destination competitiveness is an important issue for tourism and other entrepreneurs, and also for an area's inhabitants and authorities. On the global, competitive tourism market, the most important source of a strong, competitive position is offering supreme customer value. An in-depth analysis of the process of creating customer value in tourism destinations is necessary. This analysis should include contemporary views on value creation connected with the concepts of value co-creation, experience economy, and service-dominant logic. Tourism destinations seem to be an especially attractive area of implementing the co-creation value by service providers and customer concept. This is an effect of the very nature of the tourism destination's product, which requires a high level of consumer involvement when consumed.

Keywords: destination competitiveness, customer value, value co-creation, tourism product.

Introduction

The specificity of modern tourism market, where the focal point of competition has shifted from competition between companies to competition between tourism destinations [Ritchie and Crouch, 2000; Sainaghi 2006], and companies offering tourism services, depends on tourists destination choices [Go and Govers, 2000], creating a situation where the concepts of competition and competitiveness of tourism destinations acquire a special importance not only for public entities, which are responsible for the social and economic development of spatial units, but also for the tourism sector in its broadest terms, functioning in a particular area. Entities which participate in the process of increasing the competitiveness of tourism destinations should not only be self-governments, governments and the related authorities, but also the whole tourism sector located in particular area. Thus, the role the competitiveness level for sustainable development of destinations has increased.

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Changes that have taken place in economics, policy, and law have made the view of tourism destinations as areas concentrating tourism movement and phenomena and processes of an economic nature insufficient. It is necessary to find a way to enable a definition of tourism destinations in terms of an entity active on the tourism market, in which the idea of functioning and the programming of its development is determined in ways like those in formal institutions. The character of a tourism destination product makes new economic concepts, especially those of value co-creation and inter-organizational relations, of special importance.

Assuming that the competitiveness of economic entities is their ability to achieve success in economic competition with other companies, we notice that a tourism destination characterized by high level of competitiveness is an area which is able to attract visitors by creating and delivering higher value than its competitors. A search for reasons why some destinations achieve a level of competitiveness should be performed with a detailed analysis of the process of creating and delivering customer value. The aim of this paper is a theoretical analysis of tourism destinations competitiveness, with particular consideration of the concept of customer value and processes which create it in tourism destinations.

Customer Value and Tourism Destinations

The concept of customer value is central to modern marketing theory, especially in relationship marketing. However, relations between customer value and marketing were initially perceived as weaker, and the marketing process was regarded as preceding processes of creating and delivering value, incorporating only the initial stage of value defining and selection, including customer segmentation, targeting, and value positioning. Only later, in developed concepts of strategic and tactical marketing, it was shown that value selection corresponds to strategic marketing and activities related to value assurance, and that communication relates to tactical marketing. The concept of customer value, perceived in the light of the physical attributes of products and the financial costs of the customer, was also evolving [Monroe, 1990; Gale, 1994]. The bigger picture, and one of the most often cited attempts to operationalize customer value, was presented by Sheth, Newman and Gross [1991], according to whom there are five basic dimensions of customer value: functional, social, emotional, epistemic, and conditional. This complex view of customer value enables us to grasp numerous aspects of benefits and costs that customers incur in consuming particular products. Due to the complex structure and empirical character of experiences which

form a touristic product from the customer's point of view, Sheth, Newman and Gross's concept can be successfully applied to the tourism market, as proven by the fact that it is quite often used in articles devoted to analyses of customer value in tourism [Tapachai and Waryszak, 2000; Williams and Soutar, 2000].

One of first definitions of customer value, currently regarded as a classic, was given by Zeithaml [1988, p. 14], according to whom value is the customer's general evaluation of product's utility, based on the perception of what is obtained in relation to what is given. While the product quality is a measure of what the customer receives after incurring particular costs, the concept of customer value is a specific balance between what is received and what is lost in relation to the purchase of a particular product [Zeithaml, 1988; Lee, Yoon and Lee, 2007]. Thus, a sense of high value received as a consequence of purchasing a particular product can result not only from its high quality, but also from very low expenditures spent on its purchase, or a positive relation between quality and costs. Customer value can be perceived as a surplus of subjectively perceived benefits over costs, related to the purchase and use of particular products [Szymura-Tyc, 2006, p. 74]. It must be stressed that costs incurred by a customer are not only limited to financial ones. In tourism products, the amount of time invested also plays a crucial role [Żabińska, 2005]. Other possible costs can include discomfort, effort, negative emotions etc.

Customer value has special importance in explaining the concept of competitiveness, as it is essentially subjective and relative [Bojanic, 1996]. Customer value is variously regarded in various cultures, depending on the customer and time (it is dynamic, and varies through time) [Sanchez, Callarisa, Rodriguez and Moliner, 2006]. A customer perceives the value of the services of particular company in the context of the competition, and compares it with the expected value. This means that the perceived value can change with modifications of the evaluated company's activity, or if its competition or customer expectations and/or preferences are changed [Petrick, 2004]. As such, the aim of market participants must be to deliver a higher value than their competition. What is more, the fact that customer value is a perceived value means that it applies only to those benefits and costs which are perceived by a particular customer, and this perception may not reflect reality in all its details. The process itself of perceiving the benefits and costs is related not only to cognitive processes, but also to emotional ones. As a result, customer value, like utility, is measured as a hard item.

Considerable research [Oh, 2000, Petrick and Backmann, 2002; Petrick, 2004, Gallarza and Gil Saura, 2006; Chen and Tsai, 2007; Lee, Yoon and Lee, 2007] has proved a positive correlation between a tourist's perception

of product value and his or her future desirable market behavior. Customer value has also been determined as the best predictor of potential success in market competition [Parasuraman, 1997; Petrick, 2004], the key to achieving a market advantage [Woodruff, 1997; Day, 1999, Pechlaner, Smeral and Matzler, 2002; Gallarza and Gil Saura, 2006], and the best indicator of a future desire to purchasing a product again [Parasuraman and Grewal, 2000; Petrick and Backman, 2002]. Using the customer value measurement, it is possible to explain many aspects of customers' market behavior, such as the choice of particular product [Zeithaml, 1988], intention to purchase [Doods and Monroe, 1985], or future purchases [Nilson, 1992].

However, a serious limitation of the conclusions from the above-mentioned research is that they measure value almost exclusively in terms of received and consumed services, omitting the issue of the perceived level of service value before its consumption, and even before making a choice. Thus, for the sake of further considerations in this article, the differentiation of the concepts of expected value and received value is essential [Woodruff, 1997; Szymura-Tyc, 2006]. Expected value can be defined as a surplus of subjectively perceived, expected benefits and costs, related to the purchase and use of a particular product. Received value might be defined as a surplus of subjectively perceived benefits over subjectively perceived costs, incurred by a customer as the result of purchasing and using a particular product. Thus, the former term is the basis for customers' choices and is strongly related to the concept of utility, which is a part of consumer choice theory, while the latter is the foundation of customer satisfaction. In this article, the sources of tourism destination competitiveness have been researched in customer choices on the tourism market, and the special importance of such a description of competitiveness will be related to the concept of expected value, which is also affected by the evaluation of value received, during previous stays.

The Concept of Value Co-creation

Over the years, the most frequently used concept to describe the creation, delivery, and communication of value to customers was the concept of the value chain and the value system. Despite its popularity, Porter's [1985] model of values chain and system has become subject to criticism, mainly resulting from new trends in economics, including institutional economics and relationship marketing. This criticism mainly concerns two issues: First, it has been underlined that Porter's model was strongly based on a neoclassical assumption of the possibilities of unequivocal determination

of company borders and the exclusiveness or dominance of competitive relations, which link a company with its competitors, suppliers, agents, and customers. This can be questioned in the light of modern market processes. Second, the increasingly widespread phenomenon of incorporating customers into co-creating value at various stages of its creation means that the sequential character of the value creation process has been called into question. Both of these streams are of fundamental importance for the application of the concept of value creation in practical use in tourism destinations. The change in perceiving the environment and looking for resources to gain a competitive advantage over the competition in cross-organisational cooperation is of essential importance for building tourism potential. The phenomenon of value co-creation determines the value received by a customer in visiting a particular destination.

New concepts of customer value creation tied to the consumer's changing role in the process might be indicated as a crucial result of the last twenty years into the theory of economic sciences. Among such concepts that might be said to have already revolutionized the contemporary way of perceiving processes of value creation one should name (chronologically) those of: Pine II and Gilmore's [1999] experience economy, Prahalad and Ramaswamy's [2000, 2004, 2005] value co-creation, and Vargo and Lusch's [2004a and 2004b] service dominant logic (S-D logic).

The crucial role of experience was stressed for the first time by Pine and Gilmore. In their view, experiences are a fourth form (in addition to raw materials, goods, and services) of offer in the modern economy [Pine and Gilmore, 1999, p. 2]. Considering contemporary trends in market behavior, in which consumers expect ever-new experiences, and also the fact that there are significant differences between experiences and other forms of offers on the market, especially given that experiences are resistant to mass actions and need customization, Pine and Gilmore created the term "experience economy," which might describe the contemporary economy precisely. The authors also noted the special and changing role of the consumer in an economy so defined. To their mind, experiences are created by the active participation of a consumer who shapes the experience by him/herself, both through active participation(for example practicing sports), and through passive participation, in which the participant in no way affects the form and the outcome of the process leading to the creation of the experience (for example: participation as a spectator in sporting or theater events) [Marciszewska, 20010, p. 17]. The description of former possibility is the first step toward the further development of the concept of value co-creation, which means the consumer's active participation in shaping the received value.

In the concept of value co-creation, it is assumed that a consumer and a company co-create value and experience of co-creating becomes the basis for that value. The process of value creation is focused on particular people and their experiences. Increasing the complexity of offers, such as the dangers and benefits related to them, introduces confusion and frustrates most consumers, whose time is limited. In such a market, consumers are transformed from isolated to co-operating, from unaware to informed, from passive to active [Prahalad and Ramaswamy, 2005, pp. 13-14]. One of the basic observations, which prompted such a description of market relations is the increasing level of consumer knowledge and independence, which is mainly based on the computer science revolution, especially on the popularization and ongoing development of the Internet. Owing to access to great amounts of information, especially on the Internet, consumers can make decisions based on a wider knowledge of a particular subject. Affiliation with a global community of network user also shapes a global way of perceiving the available offers. Additionally, within the "big family" of Net users, it is simple to form various issue-related communities of consumers, within which particular people share their ideas and feelings, without concern for geographical and social barriers, leading to a shift in the traditional direction of the marketing information flow from top to bottom. Through participation in a global web, which improves consumers' sensibilities and desire to experiment and to better the products on offer, consumers tend to share their opinions not only with other customers, but also with suppliers and producers. Using this phenomenon, many companies have prepared special enticement schemes for customers, providing effective ways of solving particular problems. Thus, using the concept of value co-creation can have a positive effect not only on the process of value formation, but also on strengthening activity innovation [de Jager, 2009]. The Internet significantly increases the number of interactions between tourists and tourism companies located in particular destination. The Internet not only enables consumers to identify and locate tourism products, but also to compare prices, share information and experiences, both with suppliers and other web users, and to individualize their choices and purchases of products, making them well-suited to their expectations [de Jager, 2009]. However, the modern Internet, often called Web 2.0, cannot be regarded merely in terms of easy access to information and passive selection of particular data; it has also become an arena of information exchange between surfers, establishing subject communities or even friendships, which leads to a type of cooperation, and (sometimes unintentional) mutual help [Tapscott and Williams, 2007, p. 31].

In a way, the conclusions and generalizations of the bases of an experience economy and value co-creation concepts (and also a recourse-based

view in strategic management, among others) is a concept of service dominant logic. Its precursors, Vargo and Lusch, point to the need to abandon old views on economy based on the production and distribution of material goods (goods dominant logic, G-D logic), which should be replaced by one derived from service marketing. This view is described by four typical stages of a modern company's marketing activity [Vargo and Lusch, 2004a, p. 5]:

1. Identify or develop the core competences, the fundamental knowledge and skills of an economic entity that represent a potential competitive advantage.
2. Identify other entities (potential customers) that could benefit from these competencies.
3. Cultivate relationships that involve the customers in developing customized, competitively compelling value propositions to meet specific needs.
4. Gauge marketplace feedback by analyzing financial performance from an exchange to learn how to improve a company's offer to customers and to improve the company's performance.

These concepts, though developed independently, create a coherent and consistent new approach to the issue of the creation of value on the modern marketplace. One should note also that their novelty and interception from traditional approaches derives not from negation of those approaches, but from the observation of dynamic changes in the contemporary economy, wherein approaches of many years ago are no longer sufficient. There is no doubt that the concepts of value co-creation, experience economy, and service dominant logic seem especially attractive when used in the services sector. The specificity of the tourism market and its products make the tourism branch an area within which the use of the concept of value co-creation is particularly advisable. On the other hand, there is a gap in both world and Polish literature, and most texts are mainly focused on problem diagnosis and the presentation of directions in which to search for the answers, or, more rarely, present partial solutions. What is missing is a holistic description of the tourism economy using new economic concepts. As such, the publication of the first book in Polish devoted to this topic [Marciszewska, 2010] should not go unappreciated.

The special role of the value co-creation concept in tourism market analysis results from the substantial emotional engagement of tourists, both in the selection process and in the consumption of a tourism product, which results in their readiness to participate in the process of value co-creation. What is more, the importance of consumer participation in the process of creating value is stressed also by the tourism destination product itself. In general, the role of forming tourism destination products by the supply-

ing entities is strictly limited to preparing a particular potential, which is used by particular visitors during their stay. The visitors make their own decisions which elements of this potential they want to use, and in what form. Thus, the consumer composes his/her own unique product, which is consumed during his/her stay at a particular area. However, consumers' engagement in the process of value co-creation during the consumption of particular elements of a destination product may be diversified. One example of a situation when consumers' participation in the process of value creation is quite low is in most accommodation and gastronomic services. The opposite happens mainly in visiting tourism attractions, especially interactive museum/exhibition objects, theme parks, or places offering tourists forms of active recreation, such as ski resorts, swimming pools, etc.

Tourism Destination Competitiveness

According to d'Hauteserre's definition [2000, p. 23], destination competitiveness is identified with position on the tourism market, while Ritchie and Crouch [2000, p. 3] mainly stress the stable acquisition of benefits from tourism development by all the entities of a particular social-economic system. In the first definition, the market is a place where destination competitiveness is verified. In the second, a similar role is played by processes underway in this area. On the other hand, as noted by Nawrocka and Przeorek-Smyka [2004, p. 122], a competitive advantage is achieved by regions whose tourism product or products meet consumers' expectations and needs to a higher degree than competing destinations. Thus, a strong market position is a necessary, but not sufficient condition for a particular area achieving a high level of competitiveness. It seems that a competitive destination is a one which has a strong and stable market position, and is able to "transform" visits of particular numbers of tourists into properly distributed economic benefits while maintaining its resources, which is necessary for holding a competitive position in the future.

It was assumed that a higher level of competitiveness is achieved by destinations whose offer and a way of presentation it enable market success, i.e. attract the desired number of tourists. This assumption results from adapting a statement that pertains to companies, that a competitive advantage is achieved on the market when a company's offers are more often chosen and purchased by particular customers than those of the competitors [Haffer, 1999, p. 50]. According to Zdebski [2008, p. 32], increasing the competitiveness of a particular region or country means that it will be more often visited by tourists. According to the rules of sustainable development,

it is necessary to consider the tourist capacity limits of a particular region; one must consider the desired number of visitors, not the highest number as is the case for a company's competitiveness. According to Carolici, Nijkamp, and Rietveld [2006], in order to achieve a competitive advantage, a particular destination has to increase the market share in concordance with the resources held. A consequence of the above statement is the fact that a competitive advantage is gained by those tourism destinations which are mainly visited by tourists that have the greatest influence on its sustainable development, as characterised by respect for the local nature and cultural values, and high expenditures spent on the local economy. Sustainable development can not be guaranteed by attracting tourists, and marketing activities should be focused on the most desirable segments of the population. Achieving this aim is mainly possible by offering a higher level of value than the competition.

A method of adapting the concept of the process of service production [Daszkowska, 1988, p. 41] for the needs of tourism destination analysis was proposed by Smith [1994]. Smith distinguishes three stages in this process. Primary inputs into a system – resources like land, work, water, capital, construction material etc. should be transformed into intermediate inputs, which are any tourist facilities such as parks, holiday camps, means of transport, museums, hotels etc. These are the source of intermediate outputs, i.e. hotels, gastronomic and guiding services or festival and museum services. The most important postulate of this model is that it indicates the need for further conscious and planned transformation of these elements in order to achieve final outputs of the production process, i.e. consumers' experiences, which can be determined as recreation, education, trade contacts, memories, adventure, etc. The first stage corresponds to the initial stage of combining factors of services production and leads to a particular service potential. The appearance of consumers is necessary to start the initial phase of services production. In tourism, unlike in other services, the only external production factor is almost always the participation of the customer. Analysing the production of services in tourism destinations, it can be noted that this participation occurs on a wider scale than in other service markets. The task of the first stage of tourism product production is to create a wide offer composed of numerous alternative and complementary elements, of which the consumer's acceptance is indicated by his/her selection, i.e. the decision to visit a particular destination. However, the fundamental task of the consumer in a process of creating tourism products is not only devoting time and energy on consuming the services, but mainly selecting among services and ways of spending time on offer, those which best meet his/her preferences and abilities. A tourist not only makes his/

her own choices of which elements of the package he or she is going to use, but also decides when and how. What is more, tourists' behaviour and emotional engagement affects the final experience of the particular trip, which, according to Smith's model, is identified with a tourism product, reflecting the final stage of tourist product creation.

The customer's expected value mainly results from the first stage of the production process. Thus, an expected value which is higher than the competitors' can derive from three main elements. First, it can be higher level of primary input than the competitors. Second, it can be higher level of excellence of the process of their transformation into intermediate input, enabling the creation of better tourism potential.[1] Finally, bearing in mind that the expected value is a specific idea of things a tourist expects from a particular place, and potential visitor makes comparisons not on the basis of real facts, but of his/her own incomplete knowledge and ideas about them; a source of higher evaluation of expected value can be a desired image of potential in the eyes of customers.

Thus, the basis on which tourism destinations create high expected value is naturally and historically shaped conditions, mostly tourism goods and locations, in relation to particular sending markets of tourism movement, other tourism areas, and traditional transportation corridors . These are the primary inputs for the production process. It may be assumed that these conditions result from locating a particular destination in specific geographical, social, and economic space. These are constant and independent from the current activities of entities creating a tourism product. It must be also noted that, unlike the company market, in tourism destinations some areas are privileged from the beginning, and there are those whose location makes the creation of an attractive tourist offer very difficult.

However, location is not the only factor that affects expected value. The proper use of a particular location is also important. The creation of tourism potential to a sufficient level is both the conscious and unintentional activity of all the entities shaping the tourism product of a particular destination. The creation of tourism potential on the basis of the permanent features of particular location can be regarded as a especially important element in building competitiveness, as it depends on the effec-

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[1] The term of "tourist potential" is used instead of "service potential," which is widely used in the production of services model. This change ceoms from the desire to stress that in tourism destinations it is not only the readiness to offer tourism services that counts, but also a readiness to host guests, in its broadest definition. Thus, the tourism potential of destinations can not be reduced to a simple sum of the service potential of particular service providers of a particular destination, but is rather the level of readiness of the whole area to host visitors. This is why tourism potential thus conceived is composed of tourist, para-tourist and general infrastructure of a particular area and the tourism attractions located there.

tiveness of activities undertaken by stakeholders of particular area. These activities apply both to real actions connected with tourism development, including tourism planning and policy, and informative ones which are related to information flow between entities co-creating a tourism product and promotion among potential investors. The management of particular destination is another important element of what local stakeholders do. Here management is evaluated in terms of its organisational frame and effectiveness in executing particular management functions. However, the large number of entities that participate in the creation of a tourism product and the complicated relations between them and the many other characteristics of a tourism product mean that, in most of cases, there is no single entity that could fully control, govern, and be responsible for shaping tourism potential.

For creating the high value expected by potential visitors, information must be properly disseminated concernign the potential, leading to the creation of a favourable image. According to W.C. Gartner [1989], the selection of the destination mainly depends on the package of benefits specific in a particular area which a visitor expects to receive and which originates from the destination's image. It must be noted that the image depends on the permanent elements of a location, the real level of tourism potential, and the intentional and incidental activities that aim to shape it (mainly promotion). It also depends on a series of activities which are uncontrollable and hard to predict, including the decisions of artists, journalists and other celebrities, which cause information about a particular destination to be relayed by the mass media or in works of art, independent of the promotion policy. Another factor which affects the image of a particular destination is the image of the larger tourism region, where it is located (e.g. Poland's image abroad affects the perception of the particular regions and places in Poland), which is a result of its location, to some degree.

Conclusions

A tourism destination's competitiveness and methods of enhancing it are currently the central point of interest of many entities on the tourism marketplace, and one of the key topics of contemporary tourism research. Given the involvement of representatives in many different areas of economics, including public authorities, as well as many different studies, we can understand the existence of many differentiated approaches to the topic. Still, among those differentiated approaches presented in the literature there is a visible domination of those based on the recourse-based view of

strategic management and spatial listing focused excessively on internal analysis and the issues of competition and relations with the key customer of destination's product – a visitor thus far seldom underlined.

The approach presented in this paper tries to fill this gap. This essay is based on the consideration of the vast number of possibilities which are behind the implementation to the practice of tourism destinations of new, increasingly popular views in economics and management, especially new institutional economy and relationship marketing. Both these concepts pertain to the value creation process in relation to the environment, including customers and competitors. They enhance a better understanding of the way visitors create expected and received value. A special role is played in tourism destinations by the phenomena of value co-creation, as the role of consumer in the shaping his or her tourism product is equally special. His or her engagement in the process of value creation is not an outcome of supply side entities using modern marketing techniques, but derives from the very essence of the tourism destination product. This product offered on the marketplace by a destination is the sum of many complementary, but also partially alternative elements, and the consumer him/herself decides which of those elements he or she wants to consume while staying at the destination. We ought to notice that such an important role of consumer in creating his or her product leads us to stress the importance of the initial stages of the production of tourism services. A highly differentiated product consumed by particular visitors can not be easily standardized and evaluated, and this is the value expected on the basis of an analysis of tourism potential analysis filtered by the image which determines decisions undertaken by tourists, and also, to some extent, destination competitiveness.

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GLOBALIZATION, TOURISM AND CITIES: PROS AND CONS

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Abstract: In contrast to a decreasing role of states in the process of globalization, the significance and role of cities have still been increasing. The global aspect of tourism processes makes some of the aspects of the cities' performance on the tourism market more intensive and at the same time of a broader scope – competition, protection of cultural resources, dependence on external entities, demand for market information. Under these circumstances internationalization is becoming a main strategic option of tourism development in cities. This paper refers to the considerations included in H.L. Theuns' selected articles and directly to his work *Globalization and Tourism: Pros and Cons* [2008]. The discussed economic effects emerging at an intersection of globalization and tourism are here developed by the third element, i.e. cities and their role in the modern world economy, including the tourism market.

Keywords: globalization, internationalization, city, urban tourism, world tourism cities.

Introduction

In his paper entitled *Globalization and Tourism: Pros and Cons* [2008] H. Leo Theuns discusses manifestations and consequences of the influence of globalization on tourism. Assuming a macroeconomic perspective, in the first place he considers globalization in the context of its geographical scope and its influence on the creation of wealth and repartition of incomes within national economies and among countries. In Theuns' opinion, it results in decreasing the role of states in the arena of international economic relations: "state power decreases when global capital power increases" [Theuns, 2008, p. 100]. However, with reference to tourism, an influence of globalization can be observed, in the first place, with reference to changes in the structure of world tourism demand, the environment as a main source of wealth on the market and the security of the sphere of demand and supply.

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This article is complementary to Theuns' considerations. Its idea lies in adding third dimension to the discussed issues. Globalization, along with a partial weakening of state control in the arena of international economic relations, made cities become important players in this arena. Beside a micro- and macroeconomic level of analysis of the effects of globalization, a mesoeconomic level turns out to be equally important. Paraphrasing Theuns' cited words it can thus be stated that city power increases while state power decreases when global capital power increases.

Globalization and Tourism

In his considerations Theuns [2008] emphasizes that globalization, as defined by Stiglitz [2002] as "both the process and outcome of the removal of barriers to free market and the closer integration of national economies", enables a free flow of goods, services and investments among countries, but first of all it immensely increases the role of capital and decreases the role of labor as basic factors of global production. Consequently, it affects the change, in a negative way, of bargaining power of states as main players to control the world market. In Theuns' opinion, only sizeable economies with strong government intervention are able to resist the pressure of liberalization and globalization, exemplifying it with the actions performed by the governments of Russia and China. Minor states have to accept their generally passive role in this process [Theuns, 2008, p. 99-100].

Assuming a macroeconomic perspective, Theuns sees the future processes which take place in the tourist industry under the influence of globalization as a consequence of more general changes in the repartition of incomes between capital and labor within national economies, and between labor in the industrialized and the non-industrialized countries. In other words, within industrialized countries, demand for tourism by workers will be decreasing, and less expensive holiday options will be looked for. On the other hand, the demand by capital owners and top managers will be more and more sophisticated which will boost the exclusive tourist market. Next, the demand for tourism by workers in developing countries will increase as a result of growing offshoring and outsourcing in other sectors of the economy. These processes will certainly be observed in the sectors of recreational and leisure tourism but also in business travel. Since particular changes will not mutually compensate spatially, perturbations in supply are inevitable [Theuns, 2008, p. 101].

Another dimension in which globalization affects the tourist industry is sustainable development. Theuns emphasizes that the dynamics of global economic processes has broadened an understanding and treatment of this

postulate merely with reference to natural environment, underscoring long-term competitiveness of national and/or regional economies. However, an environmental aspect is still crucial in tourism as natural amenities are often a primary source of future profits within tourism industry or even the whole economy in many countries and destinations. Consequently, they should be included in the framework of the financial cost-benefit analysis of new investment activities, which is a regular action in the case of public investments. Natural resources should therefore be treated as public goods and administrative and legislative regulations are necessary for their protection from external effects and their exploitation by private entities on the basis of "free-riders". Theuns emphasizes that "in a situation where free-riders among investors profit from the lack of protection extended by government to public goods, it is doubly ironic that investment incentives would be provided, which anyway, with few exceptions, constitute a waste of government revenue" [Theuns, 2008, p. 103].

The necessity to carry out an active and long-term tourism policy as well as an economic transformation is a subject of Theuns' more elaborate considerations with reference to developing countries in his other works [1976, 1987, 1994, 1997, 1998, and this volume]. In these countries, a decreasing power of national economies in the situation of the growth of global capital and transport techniques is particularly noticeable; therefore the threat of leakages of gross foreign exchange receipts and the foreign domination of trans-national tourist corporations and tourist generating countries is very high. This, in particular, refers to small island countries poor in natural resources of strategic significance [Theuns, 2008, this volume].

Despite the fact that tourism has an international character by its nature and its development in market economies is not hampered by state intervention, it is, as Theuns emphasizes, relatively free of some processes inscribed in the essence of globalization like outsourcing and offshoring. This is mainly due to the fact that the generation of a tourist product is location-specific and thus it belongs to a category of unalienable products [p. 101]. In this context Theuns, despite a macroeconomic perspective of his considerations, touches upon a very important attribute of tourism activity which globalization is not able to diminish; on the contrary, it magnifies it. Strictly speaking, tourism sector is locally-oriented, what is strongly emphasized by Cooper who writes: "Produced where it is consumed, tourism is an activity that is delivered at the local destination, hopefully by local residents and drawing upon local culture, cuisine and attractions, yet it is impacted upon by global processes, creating the dilemma of global/local nexus" [Cooper, 2008, p. 109]; Cooper goes on to say that "tourism can be viewed as an activity occurring at the local level that

is impacted by the broader processes of globalization" [ibid.]. This local level is getting more and more important in modern tourism. We can even say that its impact has a global scope.

Cities, Globalization and Tourism

Although global processes have affected, in the first place, the macroeconomic level, at the same time, they have reinforced the local level, lending it an international significance. Porter [1990, 1998] states that in a global economy, in which classical factors of production are more and more accessible, the enduring competitive advantages lie increasingly in local sources like differential knowledge, information flow, skilled labor force, relationships, motivation, and mutual reinforcement, that cannot be matched from a distance. Thus, cities and regions become a unique environment for business activity and for increasing the competitiveness of companies [cf Porter 1990, p. 154-159]. Sassen [2006] also points to the reinforcement of bargaining power of cities as one of the forms of globalization of the economy. It is in cities where the leading reserves are accumulated and the processes which generally affect the whole world economy are created and developed. However, Sassen points out that only the biggest and most powerful cities fully benefit from advantages brought about by globalization. These cities have a status of global cities and develop international circuits of connections. At present they are the main centers of the world economy management, the key locations and markets of leading sectors of economy – financial services and specialized services for companies as well as the main places of provision of these services including the creation of innovations [Sassen, 2006, p. 7].

Globalization does not only aggrandize cities, but it also restructures them and this process includes, beside the economic aspect, also culture, in a broad sense, and amenities. Consequently, the new roles of cities can be distinguished: city as a global market participant, city as a global democracy, and city as an entertainment machine [Clark, 2004, p. 293]. In the light of the subject of this paper special attention should be paid to the third of the roles mentioned above. Clark states that consumption has replaced production and has become the main driver for modern urban development and urban policy. Much of consumption is driven by local specifics, which define a city's unique appeal: cafés, art galleries, architectural layout, urban landscape, and aesthetic image of a city. Both urban public officials and business as well as non-profit leaders are using culture, entertainment, and urban amenities to enhance their locations – for present and future residents, tourists, conventioneers, and shoppers [Clark, 2004, p. 1 and pp. 293-294].

In this context urban tourism has become influential across the board as a significant part of this huge industry. Maitland and Newman [2009a] point out that urban tourism has become an inseparable part of the transformation of many cities over past decades and has thus been an element of the new direction of their development. They stress that it has an impact on such spheres and processes taking place in cities like middle class return to the city centers, change in the structure of current consumption and the style of everyday life, a new look at the quality of life and amenity in the context of attracting and retaining residents and workers [Maitland, Newman, 2009, pp. 1-2]. Cities as attractive places of leisure and work attract educated, creative and dynamic people who make decisions as to the further development of these places and, indirectly, as to the location of companies and capital. Cities have therefore become places of development of the creative class, the most desirable, from the point of view of cities, group of "users" [Florida, 2005].

Cities, especially the big ones, have become the most attractive and most frequently visited destinations [Law, 2002]. Traditionally, a significant part of historical and cultural heritage has been concentrated in cities; cities are also the places of creation of new forms of recreation and tourism; they also have the most developed infrastructure adapted to spend free time [Aleksandrova et al, 2011, p. 140]. This process is well-founded in statistics both referring to international tourism and in general results. Table 1 illustrates the ranking of the 15 most popular, from a tourist point of view, cities in the world (on the basis of the number of international arrivals) and in Europe (on the basis of the total number of domestic and foreign tourists' bednights). Both lists testify to the phenomenon that was touched upon above – metropolitan areas, many of which enjoy a status of global cities, are becoming the greatest tourist destinations. Following this way, Maitland and Newman, with reference to the concept of global cities, introduce a notion of world tourism cities. These cities are rich, multi-functional and polycentric centers, located in global circuits of both money and people, with substantial historical assets and iconic buildings and their status of leading cultural centers and global business networks, which offer a very wide range of experiences and possibilities of spending free time. Therefore they generate large numbers of business visitors in addition to those tourists attracted by tradition and culture. In the rankings included in Table 1 only two cities – Antalya and Palma de Mallorca – do not have such a character: instead, they are rather mono-functional and oriented towards leisure tourism. Moreover, Maitland and Newman go on to say that these cities open up opportunities for visitors to discover new attractions off the beaten track, previously unknown to mass tourism [Maitland, Newman, 2009a, p. 2].

Table 1. World's and Europe's top city destinations

	(1) World's top international city destinations (2009)			(2) European top performing cities (2010)	
	Name (population in mln. – agglomeration)	International arrivals (in mln.)		Name (population in mln. – agglomeration)	Total bednights (in mln.)
1	London (12.5)	14.1	1	London (12.5)	48.7
2	Bangkok (9.5)	10.0	2	Paris (10.5)	35.8
3	Singapore (6.5)	9.7	3	Berlin (4.3)	20.8
4	Kuala Lumpur (6.5)	9.4	4	Rome (3.3)	20.4
5	Antalya (1.0)	8.9	5	Madrid (6.5)	15.2
6	New York City (22.0)	8.5	6	Barcelona (4.5)	14.0
7	Dubai (1.6)	7.8	7	Prague (1.4)	11.9
8	Paris (10.5)	7.7	8	Vienna (2.0)	11.7
9	Istanbul (13.0)	7.5	9	Munich (2.0)	11.1
10	Hong Kong (7.1)	7.0	10	Amsterdam (2.0)	9.7
11	Mecca (1.6)	7.0	11	Hamburg (2.6)	8.9
12	Rome (3.3)	5.5	12	Palma de Mallorca (0.4)	7.3
13	Miami (5.6)	5.2	13	Lisbon (2.6)	6.2
14	Las Vegas (2.0)	4.7	14	Frankfurt (1.9)	6.1
15	Los Angeles (18.0)	4.5	15	Budapest (2.5)	5.9

Source: (1) Euromonitor International 2011; (2) ECM 2011; City Population 2011.

The global aspect of tourist processes makes some of the aspects of the cities' performance in the tourist market more intensive and of a broader scope. This is why, again with regards to Theuns' work, attention should be paid to selected pros and cons of the influence of globalization on urban tourism.

Globalization and Urban Tourism: Pros and Cons

The influence of globalization on the development of tourism function in cities, not only those with a global status, rarely has an unambiguously positive or negative effect, which is due to the complexity of economic processes. Moreover, the influence of globalization may point to the need of certain changes within tourism management in cities. In this light, with regards to Theuns' considerations, the following problems are worth our

discussion: the growth of competition and the resulting investment activity of cities; sustainable development and protection of cultural resources; cities' dependence on international tourist markets and the importance of market information systems.

The typological structure of people visiting cities, and especially metropolitan areas, is very diversified. Visitors are experienced international city users and often familiar with and attached in some way to the cities they visit (relatives or friends, business, visiting the same place for the second time etc.) [Maitland and Newman, 2009b, p. 135]. Moreover, globalization has an impact on the process of touristification of life in a city. Residents' consumption behaviors are changed by their own experience as tourists; the size of a city and the number of tourists highlights make them behave like tourists in their own city. That is why clear demarcations between leisure and work places, recreation and work activities, and leisure and work time are eroded, and with them the delineation between hosts and visitors and touristic and non-touristic activities [Maitland, Newman, 2009a, p. 4]. Thus, bearing in mind this diversified structure of consumers and the above considerations on the inclusion of tourism in the scope of entertainment and cultural consumption, the reasons of the growing competition among cities in the scope of creation of new areas and objects to increase options to spend free time become evident. Dziembowska-Kowalska and Funck [2000] point out that the accumulation and standard of attractiveness of resources and public services, although in themselves they are not a direct source of large profits and incomes on the scale of a city, at the same time they create external benefits in other sectors of the local economy. Also, they have an impact on the companies' decisions as to where to invest as well as on well-qualified employees and managers' decisions as to where to live and work [Dziembowska-Kowalska and Funck, 2000]. The building of modern museums, stadiums, congress and cultural centers, amusement parks, organization of big events, revitalization of the whole quarters and districts: these are only some of the initiatives – the tools to increase tourist attractiveness. Cities keep on expanding their tourist offer, present new options to spend free time to visitors and residents and revitalize and enrich classical tourist attractions. They strive at making both historical attractions and modern objects enjoyable to visitors [Aleksandrova et al, 2011, p. 149; Clark, 2004, p. 294; Maitland, Newman, 2009a, p. 11].

It is large metropolises which enjoy supremacy in this competition. By their nature, they are uniquely rich in such objects and amenities; also, they have the best opportunities to finance large investments. Bearing in mind tourists' international experience, smaller cities with a status of regional centers drop out of this cultural and entertainment arms race. Despite their

rich cultural resources and/or adequately developed business and tourist infrastructure, they are not capable of providing a satisfactory spectrum of options to spend free time as compared to leading world cities. Therefore, globalization is widening the gap between powerful world tourism cities and other urban tourism centers. In this situation the only way to build up a competitive advantage for the latter is not the construction of bigger and bigger or more and more spectacular objects, but a drive at distinctiveness. Smaller cities have to be distinct in the areas of innovation and creativity. As Maitland and Newman emphasize: "this is an evidence of globalization – distinctiveness has become an essential asset in economic competition" [2009, p. 137].

Theuns points to an incalculable attraction of natural resources in the tourist industry and the resulting necessity of their legal protection. The problems of natural environment are not so important in urban regions in comparison with other types of tourist regions (which does not mean that they do not appear at all). However, what comes to the fore in cities are historical and cultural resources, in a broader sense, as well as entertainment objects and recreational facilities financed from public resources. The problem of externalities and of the free-rider is related to the above as closely as to natural resources. Many of them exhibit the characteristics of public goods – they are indivisible and non-rival and non-excludable in consumption and therefore they are made available to tourists and other interested parties on non-market principles. Subsequently, other resources exhibit the characteristics of club goods whose provision is excludable [McNutt, 1999]. In the case of the former a number of consumers and a market price are impossible to establish. In the case of the latter we also deal with a problem of establishing a price which would reflect a game of demand and supply since many of them (like all public goods) are financed by the public sector dominated by administrative and political processes [McNutt, 2000]. A zero or minimum profit obtained of the sale makes it necessary to find indirect sources to finance their current maintenance as well as their promotion (it is also impossible to establish total costs of their promotion or to assess the effectiveness of these actions with regards to the capital involved). In the case of domestic tourists a redistribution through the tax system is possible, yet with regards to its general principles it is not satisfactorily effective. However, the growth of foreign tourists in cities makes even this indirect mode impossible to apply. Foreign tourists thus become free-riders (in whole or in part) benefitting from monuments and cultural objects, cultural events, parks, recreational areas, architectural systems, historical objects as well as tourist tracks, bicycle paths, urban visual information, illumination and light installations etc. Tourist companies well-located in the vicinity of

monuments and recognizable buildings are also free-riders which benefit from an extra rent included in the price of a service.

The problem of reducing the effects of this market failure can be solved in two ways. The first one refers to an introduction of financial regulation in the form of a tourism levy or visitors' tax by city authorities (paid indirectly by tourist companies and directly by their guests). The other way consists in the creation of a voluntary special purpose fund (integration of private sources or private and public sources) for financing the promotion of the whole tourist product of a city including also the resources belonging to the public domain. However, Socher [2005] points out that a model solution in this area is the introduction of two kinds of levies: (1) a levy put on tourists by way of their opportunity to benefit from public goods – the revenues of which should be fully assigned to financing the production of these goods; (2) a levy put on all the enterprises that profit from city promotion, whose amount would depend on their economic calculation (measured by the returns of sales, the turnover etc.).

In the times of tourist market internationalization a threat of dependent development does not refer only to countries, but also to cities. This dependency is connected with the problems of protection of public goods in tourism. Similarly to the situation of many Caribbean countries described by Theuns in this volume, cities rich in tourist resources, in this case in the form of historical and cultural heritage, sometimes with world-famous highlights, are also exposed to the threat of dependency. These attractions generate a tourist product which is rich but not very diversified with regard to many consumers' segments. What is important, these cities are characterized by a high standard of living, but at the same time they have a monofunctional character where tourism is a leading economic sector: in this sense their level of economic transformation is low. Heritage is their "scarce resource of strategic economic importance" [Theuns, 2008, p. 103], but at the same time, as Russo [2002] put it, it becomes the "vicious circle" of tourism development. In this case the dependency has a local or regional scale, but it is of an international character and is additionally driven by the globalization of tourist turnout.

Tourism attractions are usually spatially concentrated in the cores of cities what results in a large concentration of tourist turnout around them [Richards, 1996; Russo, 2002]. Consequently, the popularity of these attractions in the world and technological developments in the means of transport result in the streams of tourists which, in turn, is a cause of price pressure. The growth of prices in the city center results, on one hand, in building of tourist objects (mostly accommodation facilities) farther and farther from the center and, on the other hand, in decreasing demand (but not the turn-

out) of visitors. The economic value of a tourist product is growing with an increase in the number of tourists interested in its consumption; therefore cities, to strengthen their competitive powers have to be attractive not so much to the individual tourist, but rather to the transnational tour operators that, to a large extent, decide as to the size of generated demand. This mechanism manifests itself in packaging of cultural and tourist elements [Russo and van der Borg, 2002]. The structure of the tourist market is undergoing a change: a share of long individual visits is substituted by shorter and shorter organized visits. Cities are visited by more and more mass tourists who are motivated "in part" or accidentally by culture [cf Silberberg, 1996] and use only indispensible tourist amenities and resources bearing a character of public or club goods, at the same time spending most of their funds in objects located out of the city centers or even beyond city borders. Russo [2002] aptly calls them "false excursionists". International tour operators' activities result in a spatial distribution of the benefits arising from tourism between the city and communities beyond it along with the spatial concentration of the social and economic costs resulting from a growing number of visitors attracted by cultural resources. Consequently, a superficial visiting mode and a less elastic demand with respect to quality by package tourists contribute to progressive degradation and commercialization of the tourist product. Ultimately, this process may end up in the creation of an urban tourist monoculture with all the negative phenomena resulting thereof. Examples of cities distressed by the above-mentioned problem are Venice, Bruges and Salzburg [Russo 2002].

Performance of cities on the tourist market under the circumstances of global competition; pressure from external entities' activity; spatial distribution of economic benefits from the provision of services to tourists and the necessity to protect cultural attractions require a permanent measurement of economic effects of tourism on the city economy and the collection of statistics and carrying out market research. In Vanhove's opinion, "measurement of tourism activity is important for both public and private sector. Without reliable data it is impossible to demonstrate the economic importance of the sector in terms of value added, employment, exports and imports. An efficient policy also requires data on the supply and demand structure and the development of the sector" [2005, p. 21]. That is why a tourism information system is needed to collect, in a permanent and systematic way, the tourism supply and demand data at a city level. The initiation of such a system is of crucial importance because of, in the first place, widely emphasized difficulties in obtaining hard statistical data in the tourism sector because of its heterogeneity, complementarity and distribution of entities. It is therefore important that such a system collects information on

all aspects of the tourism business in a city and be able to provide information relatively rapidly about the performance of the sector. The significance of running reliable and detailed statistics of the tourism business is also stressed by Theuns [1987; this volume] who emphasizes the importance of comparing economic results in tourism with other sectors of economy, which comparison gives the full picture of the contribution of tourism to the economy. The maintenance of such a system is expensive (although the costs can be reduced by the application of an adequate frequency and sampling); moreover, the market information exhibits the public-good attributes and is not free of the problem of free-riders – hence, it becomes necessary to involve city authorities in this process. The information integration is a real basis for making strategic decisions to increase competitiveness both at the level of a city and of particular enterprises.

Conclusion

The issues discussed above are only some of all the aspects of the impact of globalization on tourism at the city level, even with regards to the problems touched upon by Theuns in his article which was a point of reference to these considerations. One of the questions to name is the problem of assuring tourists' safety under the conditions of global threats mentioned by Theuns – it is noteworthy to observe that the most severe terrorist attacks of the last years were carried out in world tourism cities: New York, Madrid, London and Moscow. Another crucial question is the protection of local tourist entrepreneurs from the impact of the global capital as well as many other questions.

However, attention should be paid to the fact of the growing independence of cities from government systems under the conditions of increasing business activity dependency on foreign markets and transportation tracks. In this respect, position of cities is privileged, also on the tourism market. Globalization, despite the threats it brings about, is such an all-pervading and strong phenomenon, that the only mode of the activity of cities, both these with the world rank and those regional or local centers aspiring to such a rank, is an assumption of international orientation with reference to defining their position and their competitive potential on the tourism market. The urban tourism market is an international market, what should be a leading point of reference to building and assessment of market position. The domestic market, dominant with regard to accessibility of public statistics, should be treated as one of crucial market segments. Modern domestic consumers are in fact the consumers with international experience and

thus with the same demands and expectations as foreign tourists. The shift into an international dimension is connected with an apparent lowering of the market position of many cities, relatively high with regards only to the domestic market, but false from a real point of view. What really reflects the potential of a city is its position on the international market. A vast horizon of a city competitors' perception restores a natural development perspective. This means that all activities and investments in the area of tourism should be performed with the assumption to increase competitiveness on the international scale. Due to globalization urban tourism is no longer referred to as a separate city sector or function; instead, it came to become a significant element of city development and of an increase in its competitiveness on a general scale.

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A GLOBAL TOURISM POLICY – UTOPIA, ALTERNATIVE OR NECESSITY?

*Wiesław Alejziak**

Abstract: This article is a supplement to and continuation of the author's prior investigations into the form and the scope of international collaboration in tourism, and the process of internationalizing tourism policy conducted by nation states. In this article, the perspective of analysis has been broadened from an international (chiefly European) scale to a global one. It puts forward the thesis that the extraordinarily dynamic changes underway in the broadly-defined tourism "environment" (such as the globalization of the economy, and others that are transforming the whole modern world: "megatrends") have such a major impact on the way the tourism market functions and generate such problems for the industry that it is crucial to revise our views on the scope and forms of tourism policies. Many of the key issues for the further development of tourism are such that they require solving not only on a national scale, but on an international, or even a global one. This places new challenges before the traditional conception of tourism policy. The titular investigations into the applicability or capacity for shaping a global tourism policy are prefaced by an analysis of the main theories on collaboration and international integration, as well as the identification of the chief signs indicating the development of the internationalization (or even "globalization") process of tourism policy. The issues addressed are raised in the first part of the article. The second part presents a certain wide-spanning research project which should respond to at least some of the questions raised in this article, and show prospects for the development of tourism policy on a global scale.

Keywords: tourism policy, trends, international cooperation, integration, globalization.

Introduction

Whether conceived as a form of private human activity or as an important sector of the economy, tourism is presently an imperative subject of interest for practitioners and social researchers alike. This growth of interest in this phenomena comes from both the increasing significance of tourism as such, and from the fact that the evolution tourism has undergone over the past few decades and the challenges it faces correspond with more wide-

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spread discussions on the future of humanity. The 20th century was marked by an unprecedented dynamism and scale of transformations, which took place in practically all spheres of human life. Tourism is one of the effects, and simultaneously an important indicator of these transformations. Only in this era (ca. 100 years) has tourism shifted from being a marginal and elitist phenomenon in the economic sense to one of the largest branches of the world economy.

The development of tourism, however – particularly given how dramatic it has been over the past few years – yields many problems. These problems are generated both within the tourism system and outside of it. The first few years of the 21st century have indicated that they are not going to go away, and that tourism will continue to confront new challenges. This also affects tourism policies, which – much like tourism itself – will need to undergo changes [Alejziak, 2000; Cohen, 2004; Cooper and Hall, 2007; Dwyer, 2008].

A phenomenon that poses a number challenges for tourism is globalization [Theobald, 2004; Cornelissen, 2005; Chakraborty and Chakravarti, 2007]. Tourism is an inherently international phenomenon, and thus substantially globalized from its inception.[1] Nonetheless, due to the specific nature of tourism as a service sector activity, the concept of globalization as it is known from industrial activity in tradeables does not fully apply [Theuns, 2008, p. 101]. Globalization demands that tourism creates the ability to balance global standards with local demands and needs, and can meet the material needs of a global community without increasing inequalities or destroying the environment. In opinion of C. Cooper, these are the real challenges of the global/local nexus [Cooper, 2008, p. 111]. Although many authors stress the significance of tourism in the globalization process, which is called tourism "hyper-globalizer" [Held, McGrew, Goldblatt and Perraton, 2000; Hjalager, 2007, p. 439], in fact tourism is among the many causes and effects of globalization processes [Hjalager, 2007, p. 438],

Tourism is perceived as an important aspect of politics, both in the developed and developing countries of the world. In the former it is regarded not only as an important branch of the economy, but also as one of the most effective factors in social and cultural progress. Its particular significance in the domain of politics also arises from the fact that tourism is closely tied to many branches of social and economic life. For many decades, with the development of tourism research, countless works have demonstrated and proved the significance of tourism as an economic, social, and political phenomenon. They indicate that tourism has exerted a powerful effect

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[1] According to R. Wood, tourism is a substantially globalized phenomenon: "in a sense, tourism is in globalization as much as globalization is in tourism" [Wood 2008, p. 107].

on the utilization of space and the character of infrastructure. It also generates employment and regional development, and establishes strong ties with education, culture and healthcare. At the same time, tourism is highly dependent on the quality of the environment, and transport and security technologies.

The development of tourism requires coordinated action in various branches of the economy [Elliot, 1997; Hall 2008; Kozak, 2009; Woodside and Drew, 2008]. It also requires solutions to countless societal problems. That is why development of tourism must be planned, and the best way to achieve this goal is conscious tourism policy [Goeldner and Ritchie, 2006, p. 12]. Countries and regions where development of tourism has been uncontrolled are experiencing many social, economic, cultural, and even political problems. All of these factors have made tourism an important aspect of administrative policy and federal management for several decades. Its scope, forms of conduct and available tools may vary, depending on the character and significance of tourism in the individual countries.

The necessity to introduce a tourism policy – both on a regional and an international level – results from the fact that the development of tourism triggers many positive and negative consequences.[2] It would seem that the scope of international collaboration, and thus – to simplify somewhat – "international (global?) tourism policy" as well, could encompass most fields of tourism policy run by nation states. There is a common belief that people engaged in the practical side of tourism policy should concentrate on making tourism a modern economic sector and a source of economic prosperity for the organizers, service personnel and residents of highly touristed regions. At the same time, negative processes that accompany tourism development need to be eliminated. These include: environment degradation, unequal distribution of benefits created by this development, the reduction of local influence on decision-making processes, the dominance of major tourist corporations, social pathologies etc.

The above-mentioned problems form the main study area on tourism policy. Unfortunately, the majority only contribute to the dilemma, and such studies pertain only to selected aspects of how tourism functions [predominately marketing and management]. There is an insufficient number of studies that treat tourism policy as a complex phenomenon linked with processes that change the image of contemporary world [Burns, 2003; Leslie, 1993, pp. 338-340]. These processes include: globalization, accumula-

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[2]   The most critical effects of the development of tourism, and the resulting tasks for tourism policy, are presented in the "Maximize Opportunities – Mitigate Problems" chart (Figure 27) included in *Sustainable Tourism Development: Guide for Local Planners* [UNWTO 1993, pp. 123-125].

tion of capital, the decreasing role of nations and the growing significance of international organizations, changes in social structure, new models for organizing public life etc. There is a clear lack of publications that would signal a breakthrough or determine a new quality in a national approach to tourism. On the other hand, unusually rapid change occurring in tourist branch and other affiliated areas make previously developed models unverifiable and prevent us from solving various problems in tourism policy [Edgell, 1999; Alejziak, 2009; Kozak, 2009].

The tourism market shifts they reflect have had a major impact on the development of international cooperation in this field. Over the last few decades, international tourism has developed very quickly, and many institutions of various sorts have come about which have additionally dynamized the development process. The development of international organizations has played a role in this respect,[3] as has the development of other forms of international collaboration and integration [Barcik, 2011]. The central phenomena, processes, and facts for tourism development and international collaboration are presented in Figure 1.

The development of collaboration and certain forms of international integration in tourism have taken place in various parts of the world, though it has concerned Europe in a particular fashion. This stems from the fact that, apart from the many regional international organizations involved in tourism development, other dynamic integration processes (political and economical) have taken place in Europe which have aided the expansion of international collaboration (particularly the creation of the European Union).[4] They have also laid the conditions for creating entirely new planes and forms of collaboration, changing the face of today's tourism (e.g. freedom to travel in the "Schengen Zone" and in the "Euro Zone"). Although the relaxation of strictures on international travel and the activities toward its facilitation have chiefly concerned the European states, their effects have had enormous significance for the development of tourism around the world. Indeed, certain integration efforts have also been adopted on other continents, albeit on a much smaller scale.[5] The issues in international col-

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[3] Both those geared toward tourism (e.g. UNWTO, WT&TC, UFTAA) and para-tourism (IATA, IFN).

[4] Until recently the classic model of tourism management (the basic tool for carrying out tourism policy) could be presented in the following structure: *nation – region – local community*. However, countries that belong to the European Union (and to some extent countries that aspire to become members of EU) have adopted a new model that looks something like this: *Europe – nation – region – county – city (village)*.

[5] We should indicate such regional groups as: NAFTA – North American Free Trade Agreement; TAFTA – Transatlantic Free Trade Area; CARICOM – Caribbean Community and Common Market; AFTA-ASEAN Free Trade; "MerCoSur" – Mercado Comun del Sur etc.

laboration and integration, and the significance of existing theories and concepts in this field for shaping global tourism policy are the topic of the next chapter in the following work.
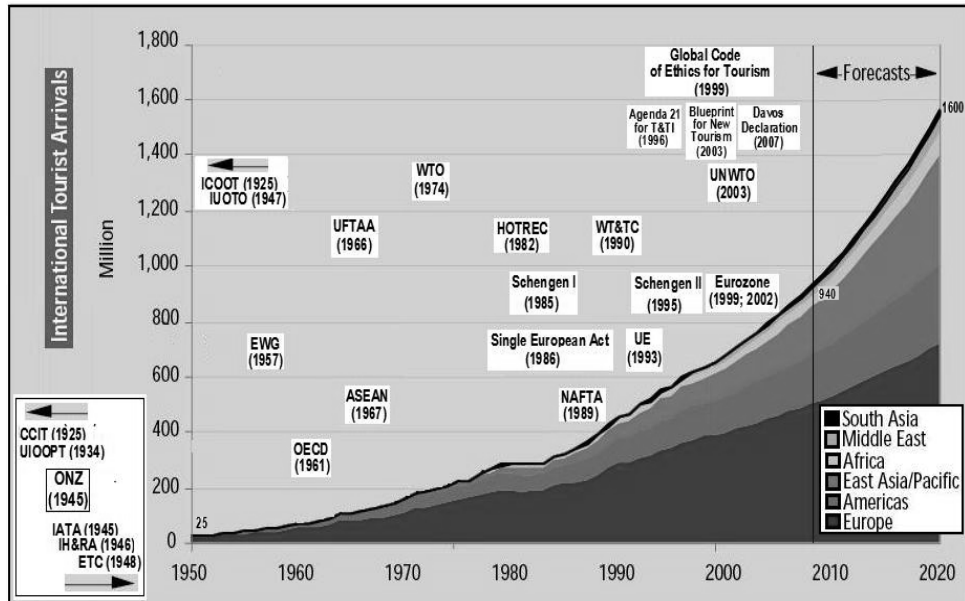
Figure 1. International collaboration and the development of tourist movement
Source: author's diagram based on [UNWTO 2011, p. 4 and WTO 2000, p. 9].

Theories and Concepts for Cooperation and International Integration and the Question of Shaping a Global Tourism Policy

Because tourism has had marginal significance (whether economical or political) over the long period in which international relations have taken shape, international cooperation in tourism has a relatively short history (an outline of its development, with reference to intergovernmental cooperation, is presented in the following parts of the article). Only the remarkably dynamic development of tourism in the 20th century (particularly following World War II) has caused this cooperation to become more dynamic. Increasingly, on various levels and various planes of international cooperation, bilateral or multilateral activities are undertaken to solve tourism issues, gradually taking the form of an international tourism policy [Edgell, 1990; Barnes and Barnes, 1993; Alejziak, 2005]. The development of this cooperation is, to a large extent, part of a general tendency to increase the

significance of integration processes in the framework of international relations – of which tourism is a vital element, after all. This is also why it would seem that discussions on the possibility of creating or implementing a tourism policy on a global scale should take place on the basis of (or at least taking into account) a theory of international integration.

The relevant literature describes many political theories and concepts on international integration. Nonetheless, it is still comparatively weak in terms of the knowledge it provides, both in terms of international relations and policy studies. With the exception of European issues, theoretical reflections on international integration continue to be *in statu nascendi*, which is why it is difficult to speak of a general, intersubjective, and accepted theory of international integration (economics offers essentially the only practically full model in this field, though more with reference to regional than global integration). The multiplicity of and basic relationships between the central theories of international integration are illustrated in Figure 2.
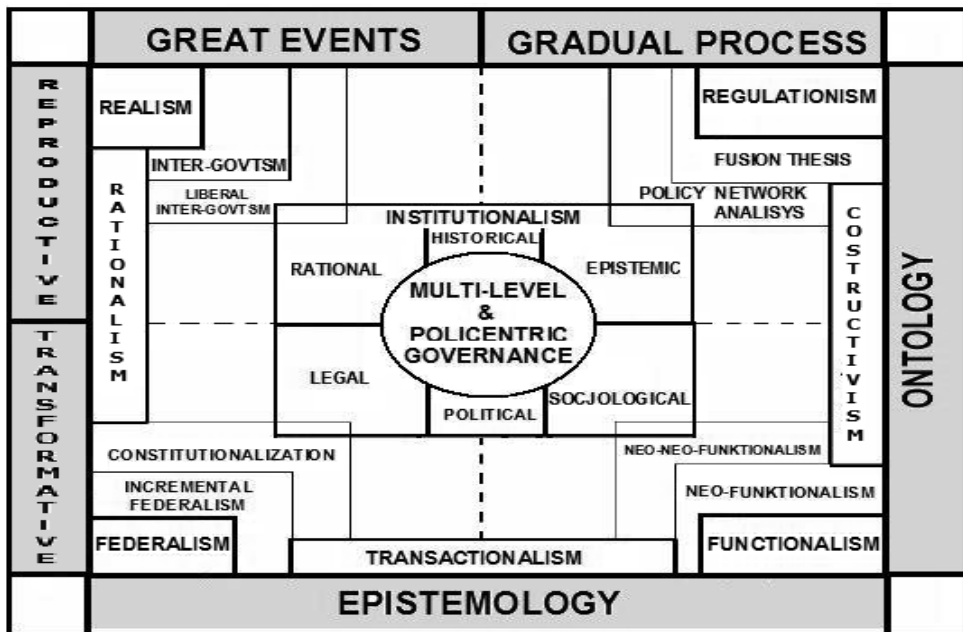
Figure 2. A mosaic of the theories of international integration
Source: author's diagram, based on [Schmitter, 2005, p. 48 and Schmitter, 2010, p. 10].

The theories presented in the diagrams (in many cases we are dealing less with theories than with certain concepts and models) approach the essence, scope, and form of international integration in very diverse ways. None of them deals with tourism in any particular way. This also explains

why investigations into tourism integration on a global scale must, to a considerable extent, be based on analogies and comparisons. It would seem that among all the existing theories, the most applicable here is the **Multi-Level Governance (MLG) theory**, developed by Gary Marks and his collaborators, who presented its main premises in the mid 1990s [Marks, Hooghe, Blank, 1996]. This concept is currently regarded as one of the more interesting attempts to explain the prevailing mechanisms in integration processes, especially in European Union [Borkowski, 2007, p. 161]. P. Schnmitter stress the "poly-centric" as well as the "multi-level" nature of the EU in order to include the functional dimension along with the territorial one. A system of Poly-centric Governance (PCG) can be defined for making binding decisions over a multiplicity of actors that delegates authority over functional tasks to a set of dispersed and relatively autonomous agencies that are not monitored – whether *de jure* or *de facto* – by a single or collective institution [Schmitter, 2002, p. 7].

The originality (and basic value) of multi-level governance comes not only from the content of the hypotheses presented, but also from the fact that – unlike many other theories – it is based on fairly solid methodological foundations. This concept not only takes a modern approach to the issues, but also has a wide-angle research problem, whose basic aim is to illuminate both the conditions and the course of the integration process itself, as well as its "product," such as the European Union. For it is the EU – as the most complex and effectively realized example of advanced integration processes[6] – that is the basic subject of analysis for this vein of inquiry. The Multi-Level Governance concept can have research applications not only in European Union, but also in other regions of the world and other integration groups, in certain regions, and on a global scale as well. In Multi-Level Governance, after all, we are dealing with research problems posed in a fundamentally different way (from other integration theories), where, for example, examining the European Union is an means, and not the aim of the research.

At the heart of the creation of a multi-level governance concept lies a critique of an intergovernmental approach, and the act of giving states and governments key roles in integration processes. This theory is based on three fundamental premises:

a) state governments – while remaining important participants in integration processes – have no monopoly on decisions made on many levels by the various actors involved in these processes. States therefore divide their once-exclusive competencies with other actors, especially supranational institutions (e.g. the European level, in the case of the EU).

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[6]   This is also why some researchers treat it as a "laboratory of sorts, which allows us to have a deeper understanding of 21st-century policies" [Jachtenfuchs, 2000, p. 349].

This collective way of making decisions causes governments to lose control over the decision-making process at a certain point;

b) there is a variety of planes for executing political interests and integration processes (local, regional, national, European, and in some cases, even global), which are linked, creating a network of sorts. Instead of a hierarchy of planes, we are dealing with numerous communication channels, which often bypass intermediate planes. National subjects (parties, relevant organizations, corporations etc.) and various subnational actors (regional and local) try to communicate directly with institutions that make decisions on the supranational level;

c) the traditional division into internal (national) and external (international) spheres is becoming, blurred as a result of the growing significance of supranational associations and corporations, which have become a partner to states in solving problems.

In the MLG concept we have a division between the notions of the "state-institution" and the "state-actor" representing it. The field of research also becomes divided – i.e. the analysis of "integration reality" and the decision-making methods associated with it – into three levels: super-systemic, systemic, and sub-systemic, each of which serves a different function and follows its own rules. The chief virtue of the Multi-Level Governance concept is the fact that it is not confrontational toward other theoretical approaches. It does, however, critique their shortcomings (e.g. their partiality or limited applicability), while exploiting their advantages (e.g. the descriptions of the operating mechanisms of the European institutions proposed by neofunctionalism, or analyses of states' behavior developed in the framework of the intergovernmental approach).

The concept of Multi-Level Governance, though probably the most applicable in considering the shape of a global tourism policy, is not of course ideal, and has some major drawbacks. It has been criticized, for instance, on methodological grounds, as it imposes an eclecticism and far-flung syntheses of various theoretical concepts, and focuses excessively on empirical aspects. It does have indubitable advantages, however, of which the most important is the fact that it levels the significance of the hierarchy and eliminates the monopoly of the single center of power and subject of integration processes: the state. It would seem that, for the time being, the development of a global tourism policy will probably occur along the paths described in this approach. Much like the situation generally prevalent in contemporary international relations – where the sovereignty of states and their freedom to act is limited by "transnational processes" and the multiplicity and diversity of actors, and the ties between them – global tourism cooperation cannot be based on an unbending hierarchy or the domination of a single center of power.

The great corporations, the professional associations, lobbying organizations, and many other actors on the tourism market enter into set interaction with each other, above state boundaries, as it were, thus themselves becoming participants in international relations. In tourism integration processes (whether perceived in their entirety, or only in sectors – e.g. hotels, tourist transport, tour operators, tourist agencies etc.), many different subjects are engaged, and the borders between public and private actors begin to blur. Each is after his own interests, interacting with others, building various coalitions etc. There is also a certain sphere of activity in which all the actors work for the "common good" (e.g. protection of the natural environment or the cultural heritage). Considering that these interests may be local, regional, national, European, or global, and that they can be executed on various scales, it should be clear that the interactions characteristic of the MLG concept are multileveled. Tourism is a fine example of the phenomena and processes described here, which is also why it is the main subject of this article – the possibility and applicability of creating a global tourism policy.

This does not mean, however, that inspiration and justification for this kind of activity and theoretical considerations on the subject can not be found in other concepts presented in Figure 2. One example might be **functionalism**, which sees social need as the basic reference category and adamantly declares itself in favor of sector integration, thus questioning the principle of territories, which its adherents perceive as an imposed and artificial construct that is essentially irrational, or even harmful [Borkowski, 2007, p. 70]. As such, they appeal for replacing territorial policy with the principle of functionality, joining David Mitrany (the creator and main proponent of the approach) in the conviction that "…some functions require regional organization, others continental, and some intercontinental and global" [ibid., p. 77]. On the one hand, the "extra-territorial" approach toward a hypothetical global tourism policy is justified in these views; on the other, some other solutions proposed by functionalism would seem difficult to execute in practice. Indeed, the nation states that stand on guard for the principle of the territory – presently the basic organizer of social and political life – were created only in the mid 19th century, and are historical "beings" that have not been sanctified once and for all; yet most researchers see the premise of liquidating territories as too radical.[7]

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[7] According to P.J. Borkowski, breaking with the principle of territories would mean a real revolution in "governing the world," in which the dominant role would be played – following Mitrany's concept – by narrowly specialized agencies, created in response to the nature of social needs and the functions they might serve [Borkowski, 2007, p. 76].

It is also for this reason that **neofunctionalism** has significantly more adherents; in tempering some of Mitrany's views and standpoints, and by introducing new components, it has perhaps come closest to developing a general theory of integration (it also played a major role in shaping reflections on European integration). Unlike functionalism, where the main stimulator of integration processes is a community of interests, neofunctionalism accentuates their lack of equivalencies, and various kinds of conflicts. As we know, tourism is a field in which conflicts of interests appear with particular frequency and on various planes [Wodejko, 2006]. As such, certain elements of such an approach could be useful in shaping tourism policy on a supranational scale. One of the basic categories of neofunctionalism might be a source of particular inspiration: "spill-over." This controversial notion signifies the gradual spread and/or deepening of integration, from a narrow range of issues (generally non-political) to an expanding (generally sectoral) integration. The spill-over phenomenon is not linear, however, and thus the integration does not cause a constant accumulation of advantages, as the above-mentioned conflicts are always appearing, modifying the reality and dynamizing the whole process. Investigations into international integration in tourism policy based on both functionalist concepts have an added virtue: for many researchers these approaches are regarded as particularly applicable to discussions on tourism policy as such, and not only in the context of integration processes [Ambrosie, 2010].

Contemporary tourism pools an enormous number of institutions that serve various functions across the tourist services system [Alejziak, 2006]. This is why it is hard to overlook the work of **institutionalism** in research on the "globalization" of tourism policy, given its basic premise, as reflected in the statement "institutions matter." At the present, the institution that most strives to solve tourism problems on a global scale is the World Tourism Organization (UNWTO). Nonetheless – considering its greatly limited operating capacity – it would be hard to call it the creator of a global tourism policy on the scale of the challenges awaiting tourism in the near future, and further down the line in particular.

In principle, each of the three variants of the institutionalist approach – rational choice institutionalism, historical institutionalism, and sociological institutionalism – introduce ideas that are useful to consider in international tourism cooperation and integration. The last-named (sociological institutionalism) in particular is a movement that has vastly expanded the notion of the institution (bringing in, for example, norms, symbols and groups of values, behavior structures, and procedures) and has developed many interesting concepts that can be of use in tourism policy.

Many of these have found their reflection in another movement of integration research: **constructivism**. This is the latest movement in investigating integration processes. It falls in line with a broader research movement – post-structuralism – and thus adopts its basic tenets and central categories (e.g. its discourse); its fundamental advantage is that it assumes a pluralism of ways of explaining integration processes, and that the various theories on the subject could be complementary. It also makes a fairly good supplement to the concept of Multi-Level Governance, which this article acknowledges as most useful (e.g. as a response to what governs the behavior of various actors engaged in the integration process).

The remaining integration concepts and theories addressing a global tourism policy are less useful, though they sometimes deal with aspects that are bypassed or only marginally developed in other approaches. One example is the issue of tourism's use of shared or "no-man's" regions ("open expanses") addressed by the **theory of international regimes**, among others. The problems involved here are not only the use of seas and oceans for tourism, or of Antarctica (though this too gives rise to problems), but also an issue that reaches more into the future: outer space tourism.[8] The development of this sort of travel will most certainly cause new branches to arise in the tourism industry, setting entirely new challenges before tourism policy (such as establishing statistics for this kind of tourist movement in the future), and ones that will only be solved on a global scale [Anderson and Piven, 2005].

International conferences play an important role in the process of internationalizing tourism policy. This includes conferences addressing major global issues (e.g. the "Earth Summit" in Rio de Janeiro in 1992, when "Agenda 21" was passed – a global program for the sustainable development of humanity and the protection of natural resources) and those devoted to tourism issues. Shared standpoints are developed at such conferences, often taking the form of declarations, such as the famous Manila Declaration of 1980 on world tourism, or the Davos Declaration on the impact of climate change on tourism in 2007. A theory which particularly accentuates the significance of international conferences for integration processes is the **liberal international approach**, devised by Andrew Moravcsik. We

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[8]   Since the famous "trip" by American billionaire and ex-scientist Dennis Tito, who became the first space tourist on 28 April 2001, financing his orbit around the world and stay on Mir Station with private funds, a few other people have tried this form of tourism. According to Virgin Galactic, run by another billionaire, Richard Branson – recognized as the first space tourist agency, which has been accepting reservations for outer space flights for some time now – the number of people planning outer space journeys is currently estimated in the tens of thousands. See: http://www.spacetourismnow.com/ and http://www.virgingalactic.com/.

ought to add that this is one of the few theories aiming to achieve a holistic explanation of integration processes in contemporary Europe. As such, it also covers issues directly linked with tourism, such as the functioning of the Schengen Agreement, or the Economic Union. In either case, analyses of freedom to roam and the introduction of a uniform European currency had fundamental significance, not only for European integration, but also for the functioning of international tourism on a global scale.

Each of these movements researching international cooperation and integration have aspects that help address the subject of whether – in an era of such dynamically changing conditions as those of the tourism sector in the 21st century – a global tourism policy is no more than a utopia, or an alternative, or a necessity for tourism's further development. It would seem, however, that with regard to the character of tourism and the global attempts to solve its problems to date, the theory which should serve as the axis for these considerations is the concept of Multi-Level Governance. This theory serves as the author's fundamental inspiration for the research problem in the present article. This is why the research project will, to a considerable extent, be described in the proceeding sections in tandem with the application of this approach.

To conclude this discussion, we ought to call attention to another aspect of the issue: the significance of tourism (and tourism policy) as a factor or an instrument of international integration as such. With reference to the premises of neofunctionalism, we ought to emphasize that tourism is splendidly adept at initiating and accelerating the spill-over process. It achieves the best results in the sectors of the economy which are not only economically significant, but are sufficiently broad and interconnected that they can initiate a whole process of gradually accelerating integration.[9] Tourism – which is by nature both a substantially international phenomenon and has a great number of ties to various fields of social and economic life – fills these conditions splendidly.

Definition and Scope of a Hypothetical Global Tourism Policy

The term "tourism policy" can have a dual meaning. Firstly, it refers to the practical activity of decision-making centers (usually federal), which strive to achieve designated goals in terms of tourism. Secondly, the term is

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[9] With regards to this aspect of the spill-over function, P. Schmitter provides the example of arms industries, where even profound integration has insufficient potential to mobilize and increase general (i.e. extra-sectoral) integration, as the arms sector is always relatively isolated from other branches of the economy [Schmitter, 1969, pp. 161-166].

used to refer to a newly formed scientific discipline, which studies a country's impact on how tourism functions. This dual understanding of "tourism policy" hinders the presentation of a single perspective. This is particularly evident in the scientific literature, where there is a fundamental lack of publications characterizing tourism policy in a complex fashion [Hall, 1993; Edgell, Allen, Smith, Swanson, 2008]. The term "tourism policy" itself has many different meanings (despite the fact that it is commonly referred to in numerous publications). Without getting into a terminology debate, we can assume that a "tourism policy" is any action undertaken by a federal authority (national, regional, local) aimed at satisfying tourist needs, the rational use of tourist qualities, capital and labor resources, establishing optimal structures and levels of tourism movement, and finally, general monitoring of tourism development, including its numerous functions and links with various spheres of economic and social life [Alejziak, 2004b, p. 44; Alejziak, 2009, pp. 187-188].

This definition reflects the most common understanding of tourism policy (specifically the execution of tasks) which is the domain of national institutions. Indeed, tourism policy is usually conducted via country authorities, using various institutions on administrative and local government levels. It should be noted, however, that independent tourism policy can be undertaken by individual enterprises operating in various branches of the tourist market, and by some international organizations. The first example is large non-national companies, such as tour operators, hotel chains, and airlines. Their trade policy may have a greater impact on how tourism functions than the national policies of individual countries [Jones and Pizam, 1993; Burns, 2003, p. 28]. The second example comes from certain regional and economic associations (OECD, ASEAN, APEC), and international tourist organizations (intergovernmental – UNWTO, and nongovernmental – e.g. UFTAA, IATA) [Alejziak and Marciniec, 2003; Alejziak, 2004; OECD, 2010; Page, 2003, pp. 286-287]. For many years, tourism policy has been undertaken by countries belonging to the European Union [Butowski, 2009; Zawistowska, 2003, pp. 9-24]. Despite the fact that designated authorities are responsible for tourism policy programs in most member states, the majority of decisions are reached by the European Committee.[10] All these factors enable us to indicate certain shared aspects international tourism policy [Edgell, 1990; Gee and Fayos-Sola, 2007; Alejziak, 2004a].

The preceding section of the article has presented a concept for researching the propriety of and opportunity for carrying out a tourism policy on a global scale. The many research goals include collecting opinions from

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[10] Tourism policy in the European Union is outlined in a following chapter.

various international expert institutions on the definition, scope, and possible forms of implementing a global tourism policy. Given that the tourism research community acknowledges the lack of a definition that renders the essence of the conditions, phenomena, and processes in the international tourism market and the contemporary tourism policy presented here, we have provisionally accepted that **a global tourism policy is, in general terms, an activity accepted by the international society, undertaken by various decision-making centers on the basis of contemporary international relations, which aims to rein in negative phenomena accompanying contemporary tourism, and to create the optimal conditions for its further development on a global scale.** The issue of defining global (international?) tourism policy, and outlining its scope and the forms in which it might be conducted will, however, be considered further in the course of this research.

Civilization Megatrends and Development of Tourism

The last few decades have been the most dynamic period in the history of mankind's development. Numerous changes have taken place which have embraced practically every sphere of contemporary world, including tourism. However, the first decade of twenty first century has shown that, apart from the changes we have witnessed in the 20th century, humanity is anticipating new challenges [see: Toffler, 1981 and 1997; Naisbitt, 1982, 1990, 1994; Fukuyama, 1999, 2002 and 2004].

The rapid development of technology, the genetic revolution, space conquest, rapid urban development, work and life style changes. These phenomena are inescapable facts of contemporary life. The substitution of traditional management with modern technology industries will bring enormous change to many branches of economic and social life. We shall witness stark change in relations between home and the workplace, work and leisure time, wealth and poverty, and so on. This will lead to changes in lifestyles and family models. The significance of the natural environment will increase; it might be put under exclusive protection. The world will seek new qualities, which will surely change the culture and ideology. Even if we take into account the arguments against skeptical visions of the world like Toffler's or Fukuyama's, such as that described by J. Gimpel [1999], many factors are in line that will soon create a world that is dramatically different from the one we know today.

The phenomena mentioned above are responsible for violent changes in tourism [Conrady and Buck, 2010; Alejziak, 2007, pp. 3-22], as well as in civilization as such. What will be the role of tourism in the first decades

of the third millennium? What functions and tasks should be expected of tourism policy? To answer these questions, we first need to analyze general conditions and tendencies that mark the course of human development. The forces of change in the tourism system are presented in Figure 3. Only by studying these will we be able to properly interpret the changes occurring on tourist market. We will also be able to interpret the course of tourism policy development carried out by countries and international organizations. The most important conditions for tourism development and its impact on the individual elements of the tourist system can be divided into those directly tied to the tourist market, and those that are independent. The former are highly dependent on the tourist branch (internal factors). The latter (external factors) will be outlined in following pages of this article (what J. Naisbitt [1982] calls "megatrends").
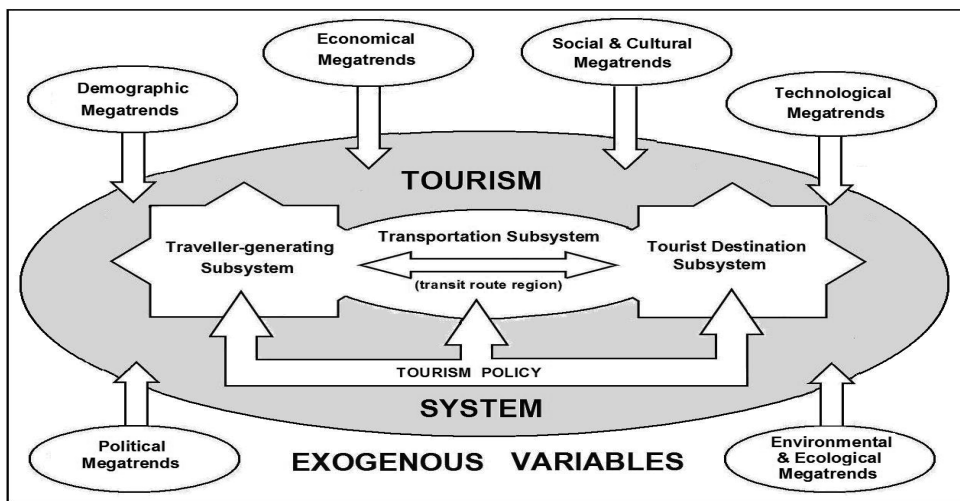
Figure 3. Forces of change in the tourist system
Source: author's materials.

Table 1 (below) presents the principal megatrends of development. They have been divided into six basic groups. Each group has factors that positively stimulate tourism development, and ones that might hinder its progress. These factors have different characters, ranges, and forces of impact. Despite the difficulty encountered in attempts to evaluate their impact on the tourist market, it is obvious that such factors are decisive in controlling the dynamics and courses of tourism development. It is clear that the majority of these factors (especially demographic trends, technological trends, ecological trends) have such a highly positive impact that it is almost

impossible to slow tourism development further. Such events as economic recession, political crises, and growth of international terrorism might temporarily slow the development of tourism, but not in the long run.

Table 1. The main six group of megatrends affecting tourism

Demographic Factors:	Political Factors:
1. The age of societies; 2. The tendency to set up home late; 3. Smaller number of family/households; 4. Increase in the number of childless families; 5. Increasing number of lonely persons; 6. Increasing number of working women. 7. Increase in economic migration from "South" to "North" and from "East" to "West."	1. Changes in the Central/Western Europe; 2. Integration of the European Union; 3. Liberalisation of international migration; 4. The convenience of passports, visas, currency; 5. Unstable political situations in many regions of the world; 6. Radical demands and an increase in the importance of ethnic, fundamentalist movements etc. 7. International terrorism.
Social & Cultural Factors:	**Economic Factors:**
1. Shortened work day, more free time and longer vacations; 2. Earlier retirements; 3. Increase of time for additional work; 4. Increased number of "two-income" households; 5. Turn toward healthy lifestyles; 6. Family crisis; 7. Crisis of faith and religion as important elements and factors shaping social relations; 8. Conflicts between identity and modernisation, especially in developing countries and among immigrants.	1. Globalization; 2. Diversity and regional changes in economic development on a world scale (increase in the significance of the "BRIC countries" – Brazil, Russia, India, and China); 3. Greater disproportion between rich and poor countries; 4. Economic and financial crisis in many countries and regions of the world; 5. Increasing price of petroleum and natural gas and hopes linked to the use of shale gas; 6. Liberalisation and development of international trade; 7. Concentration of capital in the world's economy; 8. Introduction of a single European currency (the euro) and the growth of its significance in international economic circulation.
Technological Factors:	**Environmental & Ecological Factors:**
1. Automation and computerisation (development of computing systems); 2. Development of telecommunication 3. Development of transport and infrastructure (airports, highways); 4. Use of modern technologies in everyday life (household articles, satellite television, Internet, sports equipment); 5. Development of soft technologies (e.g. franchising, outsourcing);	1. Smaller environmental resources; 2. Climate change and natural disasters; 3. Increased ecological awareness of society – development of the ecological movement; 4. Conflicts causes by the development of large agglomerations (in developing and developed countries); 5. Government care for the environment and international collaboration in the fields of natural and cultural environment protection.

Source: author's materials.

An analysis of these trends poses many questions concerning the development of tourism and the role of tourism policy. How will these changes affect tourism itself, and nations' attitudes toward tourist companies, states, and the main international tourist organizations? Is it possible to solve problems caused by the expected increase in tourism development by implementing the present canons of tourism policy? Is it possible to control tourism development (the main task of tourism policy) on a global level? If so, who should determine the tools for executing a global tourism policy? What will be the role of major associations and international organizations in this regard (especially the UN-WTO)? How will individual countries' tourism policies develop? These types of questions concern scientists and pragmatists dealing with tourism policy, but they should also be addressed to tourism branch representatives who are working on new products and strategies for operating companies.

Factors Shaping International Tourism Policy

Even though the need to discuss chosen aspects of tourism policy beyond a national level became apparent during the inter-war period,[11] the development of international tourism policy has encountered many obstacles (and still does today). The establishment of the renowned World Tourism Organization[12] led to no significant changes in this matter. From the outset, this organization has striven to be the most important center for tourism policy. As proof, we should mention the paragraph that describes the mission statement of the organization. The UNWTO aims to serve as a global forum to establish tourism policy and to be a practical source of information on tourism for the member countries and tourist branches worldwide.[13] In 2003, the World Tourism Organization was classified among the elite of specialized UN agencies. This fact gives hope for the UNWTO's growing role on the international arena, and a greater impact on solving global problems in contemporary tourism.[14]

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[11] In 1925 the Hague hosted the International Congress of Official Tourist Propaganda Organizations, which essentially initiated official international contacts for government tourist organizations [Kulczycki, 1982].

[12] This organization – essentially the only true international tourist organization on a global sale – came about in 1974 as a result of the transformation of the non-governmental IUOTO (International Union of Official Travel Organizations) into a governmental organization.

[13] "The World Tourism Organization (UNWTO/OMT) is a specialized agency of the United Nations and the leading international organization in the field of tourism. It serves as a global forum for tourism policy issues and a practical source of tourism know-how," www.world-tourism.org (21.07.2011).

[14] The UN was granted specialized status by the UNWTO under the exclusive resolution A/RES/58/232 of the General Assembly, passed on December 23, 2003. Cf.: www.world-tourism.org/newsroom/Releases/2003/December/UN.htm.

Thirty years ago, a classic author of tourism theory, Jost Krippendorf, called for creation of a new tourism policy [Krippendorf, 1982, pp. 135-148]. According to his concept – which would be based on new values and qualities – ecology and the needs of residents living in tourist areas should come before economy. The main priority is to "guarantee various tourism needs to all types of tourists by employing efficient tourist tools and by including the interests of local residents" [Ostrowski, 1983, pp. 128-152].

Ecological considerations and sustainable development form the main stream of international cooperation in terms of establishing foundations for a global tourism policy [Kamieniecka, 1998]. However, we ought not to neglect other aspects that affect tourism. Taking into account experiences from many countries where tourism has been used for political ends teaches us that the main principle should be the ideal neutrality of the entire sphere of tourism and leisure. Tourism policy ought be complementary [not substitutive] toward other branches of national policy [Alejziak, 1992, pp. 35-36]. The main task of tourism policy [regardless of the scale] is to create favorable conditions for tourism development and to support the initiatives of the tourist branch that are based on private property. This would allow the tourist market to satisfy the tourism needs of citizens, while bringing rational benefits to tourist areas. In addition, it would help it to be competitive on the international market without devastating cultural heritage and the natural environment, which are the basic resources of the tourism industry.

To refine this concept of tourism policy in individual countries and to establish the foundations of international tourism policy many people around the world have participated in various congress meetings, international seminars, and conferences, like the aforementioned Manila and Davos conferences, or the Inter-Parliamentary Tourist Conference in the Hague (1989), when the Hague Declaration was passed. Timely observations and remarks for people and institutions engaged in the process of establishing tourism policy aid the exchange of opinions and the development of concepts. It appears that in the recent years people have comprehended that certain topics and problems require a shared international tourism policy. An example of such an activity was the meeting in Washington, DC that took place in 1990. During the First Assembly of Tourism Policy Experts the panel strove to develop the foundations of a global tourism policy [Go, Goulding, Litteljohn, 1992, pp. 56-57]. Regardless of what one might say, this task is less than simple.

To some extent, the determinants for the development of a tourism policy on a global scale are outlined in the three relatively recently passed documents and actions undertaken by several international organizations. The first document – "Agenda 21 for the Travel and Tourism Industry: *Towards*

Environmental Sustainable Development" – was developed in 1996 by the World Tourism Organization (UNWTO), World Travel & Tourism Council (WT&TC), and Earth Council [Agenda 21, 1996]. This agenda determines specific actions for governments and local authorities, especially in terms of supporting sustained tourism development and private partnership.

Soon after this document, a regional and local version of the "touristic" Agenda 21 was elaborated. For example, in November 2001, the European Commission proposed developing and implementing an Agenda 21 for the EU tourism sector. Both the European Parliament and the Council of Ministers, in their two special resolutions (of 14 May and 21 May 2002), endorsed the proposal, and the document titled "Agenda 21 – Sustainability in the European Tourism Sector" [Agenda 21, 2002] was discussed 10 December the same year, during the European Tourism Forum in Brussels.

The second document – "A Global Code of Ethics for Tourism" – was developed in 1999 by UNWTO in consultation with over 70 international organizations. Besides the preamble, which comprises references to several important declarations, conventions and other international acts pertaining to tourism, the Code consists of a 9-item list of laws, duties, and tasks for every major subject of the tourist market, and procedures that relate to execution of its records and solving disputable issues. Its rank and significance are confirmed by the fact that it was accepted in the form of a special resolution of UN General Assembly on December 21, 2001.

Finally, the third document mentioned is similar. "The Blueprint for New Tourism" was developed in 2003 by the World Travel & Tourism Council. This document emphasizes the role of governments, which should take on the responsibility for making tourism "a factor of economic progress both on a local and a national level, which subsequently creates opportunity for better life in the world." Governments need to incorporate this role into their tourism policy program and into tourism development strategies. "Blueprint for New Tourism" features an developed vision of tourism development (from a global perspective) treated as a partnership, which provides results corresponding to the needs of economy, the business world, authorities, and local communities. This partnership is based on determined conditions [WT&TC, 2003, p. 3]:

- governments consider tourism the highest priority,
- sustained investing, including people, culture and environment,
- mutual aspiration to long-term growth and prosperity.

Despite these efforts, the development of an international tourism policy is encountering considerable hurdles. The goals, scope, and forms of tourism policy demonstrate a tremendous diversity on a global scale. At the same time, the diverging interests of the individual players in the tourist

market (such as countries, branches of the tourist industry, social groups etc.) make the creation of common global tourism policy – as outlined by J. Krippendorf – seem many years away.

Tourism policy-making is a complex process that governs the development of tourism. In this process, the coordination of the activities of various institutions is particularly significant, both locally and internationally. These institutions function in various branches of economy. The coordinating function is handled by the nation. The policy must include not only multi-faceted tourist functions and the interests of various subjects in the tourist market, but especially take into regard the fact that tourism is presently an important aspect of international relations.[15] The new phenomena and processes taking place in the world's economy create a difficult situation. Solving problems in the field of tourism demands action on an international or even a global scale. All of these factors cause extortion in developing a traditional (i.e. national) tourism policy. The future of tourism depends on the quality of tourism policy in individual countries, but most of all, on international cooperation [Edgell, Allen, Smith, Swanson, 2008; Alejziak, 2007]. The tourism policy carried out in European Union countries is a good example of long-term cooperation [Akehurst, 1992; EU, 1994, 1995, 2002 and 2010; Zawistowska, 1998 and 2003].

Tourism Policy in the European Union

Tourism is a major economic activity with a positive impact on employment in the European Union across the board. It is also an increasingly important aspect in the lives of European citizens, more and more of whom are travelling, whether for leisure or business. As an activity which impinges on cultural and natural heritage and on the traditions and contemporary cultures in the European Union, tourism provides a textbook example of the need to reconcile economic growth and sustainable development, while maintaining an ethical dimension. Tourism is also an important instrument in reinforcing Europe's image in the world, projecting European values, and promoting the attractions of the European model, which is the result of centuries of cultural exchanges, linguistic diversity and creativity [EU, 2010, p. 2].

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[15]   An interesting review of tourism policy problems and the role of research end education is presented by H. Handszuh in *Between Theory and Practice: Research as an Input to Tourism Policies Research from the View of the World Tourism Organization*, [Alejziak and R. Winiarski, 2005, pp. 223-234].

A community tourism policy rests on more than the strong belief of the member nations that the tourist industry has great importance for the economy of the European Union. It also requires standardizing tourism activity.[16] The guidelines mentioned were included in the "Green Paper," passed on April 4, 1995, comprised of a description of the tourism activities conducted by the Community, and emphasizing prospects for further development. This document stresses the fact that the Community should undertake tourism-related activity in the EU only, if member nations are unable to effectively accomplish such tasks.

Nevertheless, we can discern a trend that would suggest its separation. The founding treaties of the European Communities provide no records authorizing its organs to undertake action in tourism. Despite this fact, dynamic tourism development and its significance for the EU Internal Market have necessitated intervention in this particular branch.[17] The Maastricht Treaty is of vital importance for the development of EU tourism policy. This treaty introduced new entries on tourism to previous documents [Bąk, 2003, p. 26]. Since then, the EU has handled tourism as one of the more important branches of policy. This is manifested in such spheres and trends as: liberty and freedom in travelling in EU countries, tourist security and protection, protection of the quality of tourism, tourism statistics system, professional teaching.[18] With the Lisbon Treaty having come into force, the importance of tourism is recognized; the European Union now has powers in this field to support, coordinate and complement action by the Member States. This is a step forward which provides the necessary clarification and enables a coherent framework for action to be set up [EU, 2010, p. 4]. Some discrepancies still exist concerning shape and scope of community policy on tourism [Dziedzic, 2003, pp. 25-40]. Presently tourism policy is still perceived in

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[16]   This opinion was expressed in the Decision of EU Council [number 92/421/EEC, dated July 13, 1992] over ten years ago, confirming the need to take steps toward tourism on an international level. This decision was aimed at strengthening a complex approach to tourism, both in EU institutions and in the national policies of member countries. Article 5 of this decision states that "every year following the plan's implementation, the Commission before European Parliament and before the Council will evaluate the Union's actions that affect tourism. Cf. "The Role of the Union in the Field of Tourism," *Commission Green Paper*, Brussels 1995.

[17]   One of the first legal acts concerning tourism was a special resolution passed by EU Council on April 10, 1984. This resolution refers to EU policy in terms of tourism and features an attached European Committee bulletin titled "Policy in terms of tourism. Preliminary guidelines" [Zawistowska, 1998, p. 11].

[18]   The extent of domains and influence of various EU institutions on functioning of tourist market are described, among others, in two reports devised by ECTAA (Group of National Travel Agents' and Tour Operators' Associations within the EC). This reports summarizes the activity of EU in terms of tourism in the last 50 years [ECTAA, 2001 and ECTAA, 2009].

the European Union as a complex set of tasks in various branches of policy (economic, social, regional etc.). However, faced with new challenges which require concrete responses, during the meeting of 15 April 2010 in Madrid EU tourism ministers supported the "Madrid Declaration," which established a series of motions concerning the implementation of a consolidated European tourism policy, stressing the need to strengthen sustainable competitiveness in the sector and acknowledging the added value of EU action on tourism, providing a valuable complement to actions by the Member States through an integrated approach to tourism [EU, 2010, p. 7].

The European Committee has the greatest influence on shape of EU tourism policy (it is the principle executive organ). The current activity of the Committee is based on the work of 24 General Directorates, which are involved in specific domains. These directorates are controlled by commissionaires (each commissioner supervises the work of one or several directorates). Tourism issues fall under the Enterprise Directorate General, also known as General Directorate Number 23. The main task of this directorate is to oversee the development of every company working under the EU; nevertheless, it has a few organs which are responsible for handling tourism policy. The most important department, Tourism Unit, has a coordinating function. Tourism Unit tries to ensure that tourism interests are taken into account when preparing legislative projects that are later introduced in programs and other EU activities. This also pertains to domains that have no direct reference to tourism and set no goals before the tourism branch, but have a significant influence on how it functions. The Tourism Unit maintains close ties with many EU organs, among them: the Ministry Council, the Economic and Social Committee, the Regions Committee, and the European Parliament.

The shape of tourism policy in the European Union is of chief interest, mainly because it is perceived as an important tool for regional planning. This fact is favorable for economic activation, creates new work positions, and stimulates close relationships in peripheral regions [Butowski, 2009]. It is essential that tourism serve the role of an important factor in European integration, both economically and socially.[19] In a recent important document on tourism policy in the EU – Communiqué from the European Commission to the European Parliament and Other European Institutions

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[19] By the analysis of the factors that were decisive for development of tourism policy in EU we can state that, although reasons for intervention in tourism by various EU institutions have practically retained an economic character, it is essential that the tourist industry contributes to integrating people in a broader sense than other branches of the economy. This enables contact between different people and their cultures, which consequently helps in establishing a stronger feeling of European identity [Barnes and Barnes 1993. Cited by: Davidson, 1998, p. 39].

[COM, 2010, no. 352, 30.06.2010] – it was stressed that: "European tourism policy needs a new impetus. Faced with challenges which require concrete responses and efforts to adapt, operators in the European tourism industry need to be able to combine their efforts and work within a consolidated political framework which takes the EU's new priorities into consideration" [EU, 2010, p. 15]. This statement confirms the discussion on the courses of the development of tourism policy on an international scale presented in this paper. Several phenomena have a great impact on how tourism functions, on both a European and a global scale. Among these are globalization, the development of new technologies, terrorism, and climate change [Fayos-Sola and Jafari, 2009]. As such, it is essential to seek new grounds and forms of international collaboration for tourism policy. The wide-ranging research project presented in the concluding part of the article is meant to facilitate this.

Research Project on "AN INTERNATIONAL (GLOBAL?) TOURISM POLICY – Utopia, Alternative, or Necessity?"

This part of the work presents a research concept that aims to respond to the question posed in the title, and that of the article as a whole. This research will be conducted in the framework of a research project organized and implemented at both of the two departments of tourism policy (at the University School of Physical Education in Krakow and the School of Economics and Law in Kielce) in which author of this research is employed. The following text presents the main premises of this research and the methodology behind its implementation. The conclusion provides our basic research tools, in the form of an extensive questionnaire, which shows the scope of issues with which modern tourism must contend, and serves as a fine supplement to the contents provided in the main body of the article.

The Research Aim and Methodology

The main aim of this research is to analyze the central issues of modern tourism, particularly those that arise on an international and global scale, and to investigate the conditions and opportunities to create and implement an international (global?) tourism policy. On the basis of theoretical tourism knowledge and practical analyses conducted by various kinds of nation states, international organizations, and various European Union institutions to date, we have decided to consider the extent to which factors that

are rapidly changing the world (in particular "megatrends") affect the development of tourism policy and the solving of global issues in tourism. Our research plans to include an analysis of the conditions and prerequisites for the process of creating a global (international?) tourism policy.

One of the first tasks (or partial aims) is to identify the chief factors affecting the "internationalization" of tourism policy. Altogether 40 factors (megatrends) and their consequences for the tourism sector were selected for analysis, gathered into six groups of "megatrends" and their consequences for the tourism sector. These will be evaluated by the respondents, who will sort each of them into one of two basic categories: *stimulators*, which expedite the process, and *inhibitors*, which slow it down. In either case, the significance of these factors will also be ranked by the power of their impact. The study also asks for the respondents' opinions on the effects each of the factors will have on the tourism policy of the institutions being examined (particularly nation states or international organizations).

Research Hypotheses and Questions

The Main research issue is reflected in the title of the project as a whole: "An International (Global?) Tourism Policy – Utopia, Alternative, or Necessity?" While recognizing that arriving at an unambiguous answer will not be easy, we have decided to put forward five working (partial) hypotheses and ten research questions.

Partial Hypotheses

1. The role of tourism as an element of contemporary international relations is growing systematically.
2. On the basis of contemporary international relations tourism should not be taken as a separate phenomenon, but rather as part of a broader socio-economic and political context.
3. There are fields where conducting coordinated global tourism policy is recommended, or even essential (e.g. concern for the environment, tourist attractions that are unique on a world scale, tourist safety, combating the negative effects of climate change for the tourism industry etc.).
4. European Union policy in tourism can serve as a model of sorts for the advancement of tourism cooperation between countries with various levels of development and various tourism market models. This does

not mean, however, that it does not require essential modifications, to adapt it to the current international situation and the future challenges faced by tourism.
5. At present, the World Tourism Organization (UNWTO) – considered the main agency of international tourism policy, attempting to look at tourism and solve its problems on a global scale – has no tools to create, let alone implement a tourism policy on a world scale in a manner similar to the policies implemented by nation states.

Research Questions

Apart from the hypotheses, the project also posed a range of more detailed research questions. Some of these are presented below:
1. What is the current state and the prospects of international cooperation in tourism?
2. Is there the need and the potential to create and implement an international (global?) tourism policy?
3. What would be its scope and functions, and the forms and tools of its implementation?
4. What are the central issues in contemporary tourism?
5. Which fields show the greatest conflicts of interests?
6. Is there more significance to conflicts that arise at the crossroads between sectors of the tourism industry (tourism organizers, hoteliers, attractions, tourist transport etc.), of various cultural spheres (civilizations), and levels of economic development (highly developed and undeveloped countries), or "producer – consumer" relations, reception areas – departure regions etc.?
7. Is it possible to reconcile conflicts of interests between various groups in destinations (tourists versus local populations, people and institutions who serve the tourists versus those not involved in the tourism industry, business versus ecology etc.)?
8. How and on what basis should the transition take place from national policies to international (global) ones in tourism?
9. What should be the role of the World Tourism Organization (UNWTO) in shaping international (global?) tourism policy, and what should be the role of other contemporary international relations agencies (tourism and para-tourism organizations, the European Union etc.).
10. How is EU expansion process shaping the development of international tourism policy?

Characteristics of the Institutions (and Experts Covered by the Research)

For the most part, the project will be based on a wide-ranging investigation of the opinions of the representatives of various communities both directly and indirectly associated with tourism, particularly tourism policy in its widest definition. To this end, we will conduct surveys covering five basic respondent groups, each of which will represent a different community crucial to the issues being considered:

- National Tourism Administrations (NTA) and National Tourism Organizations (NTO). All the NTAs (the institutions responsible for implementing tourism policies) covered by the research will be in countries belonging to the World Tourism Organization (UNWTO), as well as selected NTOs (National Tourism Organization), i.e. non-governmental organizations which supplement the policies run by the government administrations where tourism promotion is concerned;
- international tourism and para-tourism organizations. We will cover fifty of the organizations with the greatest impact on the shape and direction of the international tourism market, the main agent affecting international (global?) tourism policy;
- various European Union institutions, in whose framework the process of tourism policy internationalization takes on special aspects and is most advanced. The research will cover the most important EU institutions (the European Commission, Directorate General for Enterprise and Industry (XXIII), who is directly responsible for the development of tourism, the European Parliament, the Economic and Social Committee, the Committee of the Regions etc.);
- selected Polish institutions engaged in the European integration process (going beyond the tourism field – e.g. the Committee for European Affaires, former Committee of European Integration). In this part of the research we plan to conduct a multi-dimensional analysis of documents, programs, strategies, and plans tied to the directions and forms of EU tourism policy development, their strictly empirical dimension (the questionnaire) notwithstanding;
- outstanding international and Polish tourism researchers, as well as experts/practitioners and office workers. In this part the research sample will be 50 foreign tourism specialists, particularly in the realm of tourism policy, and 50 Polish researchers specializing in tourism policy, or sometimes dealing with this issue in their research (exclusively professors and doctors).

The Research Tools

The basic tool will be an extensive questionnaire, which will be aimed directly at the institutions and people invited to take part (included as an attachment at the end of this article). The Polish respondents will be asked to complete the questionnaire in Polish, while an English-language version will be given to the foreign participants. The questionnaire is composed of 22 questions (of various types, extended to a greater or lesser extent, mainly multiple-choice, but with a few open-ended questions), and specially designed certificates allowing for analyses that explore differentiated subject responses, depending on the institutions, tourism sectors, countries etc. that are represented. The questions have all been segregated into two basic groups. The first concerns the current state of things and prospects for development in (broadly defined) international cooperation in tourism. These questions have been limited, however, to cooperation conceived in global categories, and not implemented through the agencies completing the questionnaires (i.e. the institutions they represent). The second part of the questionnaire concerns the scope and form of tourism policy conducted in the respondent's country, in particular those subjects who represent the NTA and NTO in their countries. In this part of the research, the aim is mainly to establish the impact of the various fields of state policy (economic, social, ecological, internal, international, transport etc.) on the shape of tourism policy in the investigated countries.

This research project presented falls in line with both the discussion on the further development of the "phenomenon of the 20th century" (as is often said in the tourism field), and the role of various agencies (particularly international law) engaged in the process of internationalizing tourism policy.

Conclusion

The evolution of tourism during the last century has made it "an important element of the general policy of the contemporary nation in various branches of social, economic and political life on a national and international scale" [Gaworecki, 1998, p. 106]. Undoubtedly, conscious tourism policy is the *sine qua non* factor of tourism development. We should keep in mind, however, that the world, and consequently, tourism, are undergoing further evolution. That is why the basic problem of contemporary tourism policy is not only solving existing dilemmas and foreseeing future events, but also creating further tourism development [Alejziak, 2007].

Globalization and the pace of introducing modern technologies into tourist branch heralds a genuine revolution in the system of the organization and functioning of tourist market. In conjunction with the changes occurring in the sphere of needs, motivations, and tourist preferences, such processes determine new tasks and goals for tourism policy. One of these is international collaboration and the necessity to coordinate tourism policy on a global scale. At the same time, we ought to stress that, despite the internationalization (globalization?) process of tourism policy, it is being decentralized on a national level [Alejziak, 2008].[20] The issue of this globalization, or even the narrower concept of the internationalization of tourism policy, is very seldom addressed in the literature, which seems somewhat peculiar considering the wide discussion on the changes and new challenges before tourism, as well as international relations and policies. At this time, it is difficult to unambiguously respond to the question in the title of the article: a global tourism policy – utopia, alternative, or necessity? Certain responses to both the basic questions and to many others, which are defined in more detail, should allow the research project presented in this work to be carried out.

The problems presented in this paper demonstrate, however, that discussion is necessary. We find a clear analogy to discussions and activities concerning an ever-more globalized economy, particularly those taking place on the foundation of the global governance concept.[21] Economics has often provided the inspiration for interesting research concepts and activities later developed in politics and international relations. Taking this into consideration, we might accept that the idea of global governance not only provides added justification for this issue, but might also serve as a point of departure and a plane of discussion for creating a global tourism policy. For the time being, it would seem that with the changes occurring in the

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[20] This is confirmed by academic research, which shows that tourism policy in its traditional understanding is losing significance, and that development is headed in two directions. On the one hand, there is a gradual decentralization of national tourism policy, manifesting itself in the transfer of more and more authority to the regional and local rungs. On the other, we are dealing with a process of the internationalization of tourism policy, in particular in those fields where solving problems and new challenges is impossible because of the policies being executed in the various countries (e.g. environmental degradation, the effects of climate change on tourism, the standardization of services, etc.).

[21] This is one of the latest research approaches, assuming that global governance is "…a state of international cooperation, in which the demands of international competition and the principles of the market economy harmonize with human rights and humane progress in developed and developing countries" [Haliżak and Kuźniar 2001, p. 385] and acknowledging that the lack of an effective global governance system results in wastage of resources and increased losses in all states [ibid.].

modern world, such a policy – at least in terms of some fields and categories – is not entirely a utopia, nor should it be merely an alternative to a policy run by a nation state. The internationalization of all fields in the modern world means that a global tourism policy increasingly appears to be at least a supplement and an indicator for policies run by various states, if not a necessity.

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Appendix

SURVEY
of international cooperation in the tourist sector,
and establishment and development of
an international (global?) tourism policy[22]
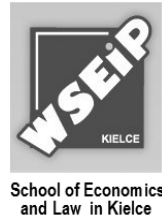
The following survey aims to gather and analyze opinions on opportunities for international collaboration in the tourist sector. It is being distributed among a select group of experts and tourism researchers in numerous countries worldwide. This survey is part of a larger research project entitled "International Tourism Policy – Utopia, Alternative or Necessity?". The main goal of this project is to establish the viewpoints of the international society, as well as the agents in the various countries that create and carry out joint tourism policy to achieve the optimal development of tourism on a global scale. The author of this survey hopes to get acquainted with opinions regarding the possibility and relevance of creating international (global?) tourism policy, the possible scope and forms of its realization, as well as the role of UNWTO and other contemporary international relations actors (tourist organizations, para-tourist organizations, the European Union etc.). It should be noted that information in this survey will be exclusively used for research purposes, and the final report will be available in full to all survey participants. I am relying on your cooperation to provide reliable information, and afterwards to send the survey to: wtalejzw@cyf-kr.edu.pl. Thank-you for your cooperation.

Wieslaw Alejziak

OPINIONS ON THE PRESENT STATE OF INTERNATIONAL
COOPERATION IN THE TOURIST SECTOR
(questions pertain to cooperation that is perceived globally, and not to cooperation realized by subjects filling out this survey, or the institutions they represent).

In the questions below, where no other indication has been provided, please mark the answers you have chosen with either bold or underlining – for instance:
□ No □ **Yes** or □ No □ **Yes**

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[22] In the survey the term "**international (global?) tourism policy**" is understood as the sum of activities accepted by the international community and undertaken by various decision-making centers against the backdrop of contemporary international relations, aiming to restrict the negative processes that accompany tourism and create optimal conditions for its further development on a global scale.

1. Do you agree with the following statements?

a) *Tourism's role as an element of contemporary international relations is systematically growing.*
  □ definitely not   □ partly disagree   □ I don't know   □ partly agree   □ definitely

b) *Against the backdrop of contemporary international relations, tourism should not be treated as a separate phenomenon; it should be considered in a broad political and economic framework.*
  □ definitely not   □ partly disagree   □ I don't know   □ partly agree   □ definitely

c) *There are problems within the tourist sector that cannot be solved by simply implementing tourism policy procedures in individual countries, but which require action on a global scale.*
  □ definitely not   □ partly disagree   □ I don't know   □ partly agree   □ definitely

d) *Is it possible that the tourism policy of the European Union contains a pattern for the further development of tourist cooperation between countries at different stages of development, and whose tourist markets function in different ways?*
  □ definitely not   □ partly disagree   □ I don't know   □ partly agree   □ definitely

2. Please evaluate each of the elements of international tourism cooperation according to the categories outlined below (global evaluation) /please mark an **X** in the appropriate box/.

	Criterion	Evaluation				
		Very good 5	Good 4	Satisfactory 3	Mediocre 2	Insufficient 1
1.	Free travel (liberalization of regulations)					
2.	Natural environment protection					
3.	Cultural heritage protection					
4.	Transport					
5.	Competition					
6.	Consumer protection					
7.	Investments					
8.	Job market					
9.	Scientific research and statistics					
10.	Staff teaching					
11.	Pro-tourism lobbying					
12.	Marketing and promotion					
13.	Public-private partnership					
14.	Compensation for disproportion in development					
15.	Friendship between nations					

3. If you were asked to indicate the 3 most important initiatives to refine and improve international cooperation in the tourist sector, they would be: please fill in the blank spaces below:
  A) ....
  B) ....
  C) ....

4. In general, please evaluate the dominant behavior styles of the listed subjects and institutions in terms of international tourist cooperation (Please assign behavior values **1 through 5**, assuming that 5 indicates the highest degree of a given type of behavior).

Types of Tourist Market Agencies	BEHAVIOR			
	COOPERATION	COMPETITION	AVOIDING INVOLVEMENT	Other – what sort? (please indicate)
GOVERNMENTS OF INDIVIDUAL COUNTRIES				
POLITICAL AND ECONOMIC ASSOCIATIONS (e.g. EU)				
NON-TOURIST INTERGOVERNMENTAL ORGANIZATIONS THAT HAVE AN IMPACT ON TOURISM				
INTERGOVERNMETAL TOURIST ORGANIZATIONS				
NON-GOVERNMENTAL TOURIST ORGANIZATIONS				
LARGE TOURIST COMPANIES (TOUR OPERATORS AND AGENCY CHAINS)				
HOTEL CHAINS				
COMPANIES THAT MANAGE TOURIST ATTRACTION COMPLEXES				
AIRLINES				
CRUISE LINES				
Other (what sort)? - ……..				

5. The most important problems (conflicts) in contemporary tourism occur in relation to the following branches or regions: *(if possible please rank from 1 to 5, assuming that 5 means the maximum degree of conflict and the highest impact on tourism operation).*

- ❑ various sectors of the tourist industry - ....
- ❑ various culture groups (civilizations) - ....
- ❑ producers – consumers - ....
- ❑ destinations (reception areas) – emission areas - ....
- ❑ developed countries – undeveloped countries - ....
- ❑ democratic countries – non-democratic countries - ....
- ❑ other (please indicate which? - ....

6. In your opinion, is the concept of sustainable tourism development a real option that can be successfully achieved in all conditions, regardless of the local situation and the model of tourist operations?

□ No   □ Yes   □ No opinion

7. Is it possible to reconcile conflicting interests of various groups in reception areas?

□ No   □ Yes   □ No opinion

8. How would you describe the role and significance of documents recently accepted by the international community which pertain to further tourism development? The documents are listed in the table below. Please underline the number which best describes your attitude to the statements given in the first column, assuming that individual numbers mean the following**:**

1 – definitely not   2 – partly disagree   3 – I don't know   4 – partly agree   5 – definitely

Opinions	Documents		
	"Global Code of Ethics for Tourism"	"Agenda 21 for the Travel and Tourism Industry"	"Blueprint for New Tourism"
1. An important document which will determine future trends of tourism development	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5
2. A document whose postulates are good, but impossible to implement in real life	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5
3. A document which in spite of all intentions does not indicate a means of solving the most important tourism-related problems	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5
4. A document which has little significance, because it isn't considered in most countries' tourism policy programs	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5
5. A document which should be considered a determinant of tourism policy in every nation of the world	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5
6. Other (please indicate below)	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5

9. Do you think that the "Global Code of Ethics for Tourism" should be recognized as one of the most important indicators shaping international (global) tourism policy at present?
□ Yes □ No, why? ►
    ❑ because its implementation will generate great opposition from different groups
    ❑ because it does not solve essential conflicts between different parties
    ❑ because it is insufficiently distributed and many environments are not aware of its existence
    ❑ other reasons (what?) - ....

10. Please finish the following sentence: International (global) tourism policy is:
□ a utopia ► if you selected this response please move on to question **19**
□ an alternative   □ a necessity   □ other (what?) - ………………...….……….
11. In what way and on what footing should the transition from national policy to international policy proceed? …...
....

12. What effect does EU proliferation have on shaping international tourism policy?
    □ beneficial   □ negative   □no effect   □ no opinion

13. If someone was to invite you to participate in a project aimed at establishing basic principles, forms and means of accomplishing "international tourism policy," you would:
- ❑ accept it without hesitation
- ❑ support this initiative but not participate in such activities
- ❑ decline participation (please list the reasons): ....
    ....

14. In your opinion, if an institution responsible for carrying out your country's tourism policy was presently invited to participate in work that aims at establishing basic principles, forms and means of accomplishing "international tourism policy," its response would be:
- ❑ to resign from this initiative
- ❑ to immediately undertake this action
- ❑ to undertake this action within the next 2 years
- ❑ to undertake this action, but no sooner than 2 years from now
- ❑ other - ....

15. Please evaluate UNWTO activity based on the criteria below and according to the indicated criteria /please fill in the appropriate number assuming that:

5 – very good, 4 – good, 3 – satisfactory, 2 – mediocre, 1 – insufficient

	Activities carried out through the tourism	Evaluation
1.	Stimulating economic development	
2.	Environmental protection	
3.	Cultural heritage protection	
4.	Stimulating social and cultural development (e.g. a healthy and active lifestyle)	
5.	Promoting the idea of sustainable development	
6.	Promoting peace and cooperation between nations	
7.	Other (please list):	
	Activities carried out by UNWTO activity (directly)	
1.	General promotion of tourism development on a global scale – pro-tourist lobbying	
2.	Liberalization of travel regulations	
3	Liberalization of the international trade of tourist services	
4.	Aid in creating tourism development plans and strategies	
5.	Technical aid for undeveloped countries	
6	Environment protection	
7	Cultural heritage protection	
8,	Consumer protection	
9.	Tourism education activities	
10.	Scientific research carried out directly by UNWTO or under its auspices	
11.	Publishing activities	
12.	Promoting and implementing sustainable tourism development	
13.	Promoting international tourism cooperation	
14.	Introducing new technologies in tourism (not only those involving computer technology)	
15.	Others (please list): …..	

16. Please indicate the impact of the factors listed below on the process of "internationali-zation" (globalization) of tourism policy (next to each factor please put **"S"** (stimulator) or **"I"** (inhibitor), depending on whether the given factor accelerates (S), or impedes (I) the aforementioned process.

Please also **indicate, from 0 to 5**, the strength of this impact assuming that 5 means high impact, 4 - substantial, 3 – average, 2 – weak, 1 – very weak, 0 – no impact (for example: S-5 indicates a very strong stimulator or supportive factor, while I-5 is a very strong inhibitor, or a factor that impedes the process of shaping international tourism policy).

Factors	Nature and Strength of Impact	Factors	Nature and Strength of Impact
1. Globalization of economic activity		13. Pro-tourist lobbying	
2. Progressive capital concentration in the tourism sector		14. Expansion of international ties	
3. Standardization of tourist products		15. Extension of the tourist season	
4. Global warming		16. Growth of tourist activity	
5. Development of research and the system of distributing tourism knowledge		17. Distribution and proliferation of access to tourism	
6. Security		18. Economic development	
7. Public-private partnership		19. Ecology and sustainable development	
8. Border-point cooperation		20. Heritage protection	
9. Computerization		21. Terrorism	
10. Growth of tolerance		22. "Virtual tourism"	
11. Problems of undeveloped nations		23. Tourist space conquest	
12. Utilization of modern technologies (including mutual databases)		24. AIDS, SARS, bird flu and other such diseases	
Other (please indicate)		Other (please indicate)	

17. What changes or new forms of UNWTO activity would you propose in order to improve its efficiency in international cooperation? /please provide examples/ - ....
....
....
....

18. Do you agree with the following statement? Pro-tourism lobbying, defined as an activity that aims at taking care of the complex interests of the tourism sector and further develop-ment of tourism, and which is being carried out by the most respected international tourist organizations (UNWTO, WTTC) and non-tourist organizations (EU, OECD), constitutes an ef-fective tool for establishing possible international (global) tourism policy.
    □ definitely not   □ partly disagree   □ I don't know   □ partly agree   □ definitely

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INFORMATION AND OPINIONS ON TOURISM POLICY PROGRAMS ESTABLISHED IN YOUR COUNTRY

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19. Do you think that, at present, your country has a conscious tourism policy, which may be expressed by either a separate multi-annual tourism development program (carried out by state authorities), or a tourism policy resulting from other detailed policies?

□ definitely not   □ partly disagree   □ I don't know   □ partly agree   □ definitely

20. How would you rate the legislative system in your country in terms of tourism policy?

□ The legislative system hinders the establishment and execution of tourism policy

□ The legislative system is appropriate and in no way hinders the establishment and realization of tourism policy

□ No opinion

21. Please determine the impact of the individual sectors of state policy on the shape of tourism policy in your country, by attributing values from 1 to 5, assuming that 5 means the highest and 1 the lowest impact.

❑ Economic policy - ....
❑ Social policy - ....
❑ International policy - ....
❑ Domestic policy - ....
❑ Other (what types?) - ....- ....
     .... - ....

❑ Transport policy - ....
❑ Environmental policy - ....
❑ Fiscal policy - ....
❑ Regional and local policy - ....
❑   Other (what types?) - .... - .....
     .... - .....

22. Please assess the level of your country's federal policy toward tourism, taking into account branches listed in the table below, assuming that 5 means the highest level of involvement and 1 the lowest level of involvement.

Branches of Involvement (Intervention)	Level of Involvement (Intervention)				
	5	4	3	2	1
1. Current administration of affairs and tourism management, mainly through the activities of specialized central state administrative departments in charge of tourism affairs.					
2. Establishment and execution of tourist laws (e.g. the tourism act and other legal regulations pertaining to tourism), as well as those branches that cooperate with the tourist sector (e.g. transport, environment protection etc.).					
3 Appointing various tourist organizations and other institutions that have an impact on the functioning of tourism (at various levels of administration and state management), including supervision and control of these institutions.					
4. Spatial planning in tourism (e.g. development of tourism investment plans, de-conglomeration of tourist traffic, tourism investments and para-tourist infrastructure).					

5.	Economic planning in tourism (e.g. determining the role of tourism in economic plans, tax systems, legal-economic initiatives, issuing economic activity licenses, customs and foreign exchange policy etc.).				
6.	Social planning in tourism (determining social tourism goals and how they may be achieved, subsidizing selected investments, state intervention policy for tourism consumption, social tourism).				
7.	Tourism staff teaching at various levels of the education system (e.g. determining the need for tourism teaching staff, teaching programs, financing and subsidizing tourist education programs, teaching quality control, certification and accreditation).				
8.	Marketing and tourism promotion (e.g. encouraging foreign tourists to visit a given country, promotion of leisure time to citizens of a given country, organization and financing of promotion campaigns, management of information and promotion offices)				
9.	Scientific research and tourism statistics (gathering and publication of data on basic tourist facilities: accommodation, local citizens' tourist activities, arrival of foreign tourists.				
10	International cooperation (inter-governmental, inter-branch initiation and support of branch cooperation and border-point cooperation)				
11	Other (please indicate):				

CERTIFICATE

M1. Sex: □ Woman □ Man **M2. Age:** .... years

M3. Nationality: ....

M4. Do you consider yourself a: □ theoretician **or** □ professional **involved in tourism research?**
► If you selected "professional," please move on to question **M10**

M5. How many years have you been involved in tourism research? .... **years**

M6. What scientific discipline do you represent? ....

M7. If possible, please indicate the three most important tourism-affiliated branches of your scientific research.
    1. ....
    2. ....
    3. ....

M8. What scientific institutions do you represent (please indicate no more than two):
    1. ....
    2. ....
    3. ....

M9. If you are a professional, then which of the sectors of the tourist market listed below do you represent?

□ Tourist attractions □ Hotel Industry □ Gastronomy □ Recreation
□ Tour-operators and tourist agencies □ Transport □ Congresses (MICE)
□ Information and tourist promotion sector □ Science and Education
□ Tourism Policy (including destination management)
□ Other (please indicate): ....

M10. Please list the 5 most important problems that tourism and the tourist sector will have to cope with in the next 10 years:

1. ....

2. ....

3. ....

4. ....

5. ....

Thank you very much for taking the time to fill out this survey.

OPTIMISING FEEDBACK THROUGHOUT THE TOURISM PDP (PERSONAL DEVELOPMENT PLANNING) CURRICULUM

Dorota Ujma*
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Abstract: The paper describes how 'Getting the most out of the assessment process' workshops within a Year 1 Tourism Personal Development Planning (PDP) module were introduced and evaluated during 2006-2007 at the University of Bedfordshire. These workshops initially stemmed from analysing student data from case study research in a 'Fund for the Development of Teaching and Learning 5 (FDTL5)' project on 'Engaging students in assessment feedback: what works?'. The FDTL5 case study had examined a traditional feedback method in a Tourism PDP module where feedback from an early related assessment (reflective and diagnostic essay) is hopefully used in preparing the final summative piece of work (portfolio), thus developing students' learning. In reflecting about learning, did students explicitly mention learning from the essay feedback, or more generally from other feedback e.g. on drafts? The students' limited awareness that feedback is part of the learning process was somewhat surprising. Using a range of methods (portfolio content analysis/ interviews/ focus groups), 2006-2007 data were collected and compared with the 2005-2006 student data from the FDTL5 case study. The workshops were found to impact upon students' awareness of feedback. Workshops now are embedded in the Year 1 Tourism PDP curriculum aiming to raise awareness and empower students to ask appropriate questions, and to encourage reflection, critical in creating life-long learning [Hinett, 2002]. The paper finishes by considering ways of optimising feedback throughout the PDP undergraduate curriculum, so that tourism students leave university as self-regulated learners who can genuinely use feedback and understand its value.

Keywords: Tourism Personal Development Planning; feedback; self-regulated learners.

Introduction

This paper reflects upon the introduction and evaluation of 'Getting the most out of the assessment process' workshops within a Year 1 Tourism Personal Development Planning (PDP) module at the University of Bedfordshire

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during 2006-2007. Prior to doing so it is important to set the context and provide some background as to where such curriculum development originated. The initiative being considered in the paper can be described as a somewhat unanticipated outcome emerging when analysing student data from case study research in a 'Fund for the Development of Teaching and Learning 5 (FDTL5)' project on 'Engaging students in assessment feedback: what works?' (ESWAF). The University of Bedfordshire[1] (via the Business School) is a partner in a consortium (with Oxford Brookes University Business School – the lead institution, and the other partner institution – University of Bradford School of Management[2]). Much of the investigation in the project has centred on investigating influences on student and staff engagement and disengagement with feedback in a variety of contexts, providing resources and conceptual frameworks (see the project website: https://mw.brookes.ac.uk/display/eswaf/Home). The FDTL5 case study being considered in this paper had examined a traditional feedback method in a Tourism PDP module[3] where feedback from an early related assessment (reflective and diagnostic essay) was hopefully to be used in preparing the final summative piece of work (portfolio), thus developing students' learning [ESWAF, 2007a].

The ESWAF project as a whole is aiming to enhance student learning by improving student engagement with assessment feedback, seeking to question and improve current processes and methods to impact positively on student learning and make more effective use of staff time. It was clear from the project's initial literature trawl that there is much dissatisfaction over the effectiveness of student engagement with feedback; this is somewhat disturbing given feedback is recognized as being central to the learning process [e.g. Broadfoot, 2007; Gibbs, 2006]. Criticism of feedback practice suggests that it is often not integral to the learning process [e.g. Higgins et al, 2001], nor does it help students improve [e.g. Stefani, 1998]. An ESWAF project conclusion was that the potential for feedback to enhance student learning is 'considerably underdeveloped' [Handley et al, 2007]. Assessment feedback becoming a 'pressing topic for Universities in recent years', has also been noted [O'Brien and Sparshatt, 2007, p. 1]. The National Student

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[1] At the start of the project the partner was University of Luton. In August 2006, the University of Bedfordshire was created through the merging of the University of Luton and the Bedford campus of De Montfort University.

[2] The project is associated with the Business and Management HEA Subject Centre rather than the Hospitality, Leisure, Sport and Tourism Subject Centre; Tourism at the University is located within the Business School.

[3] One of the co-authors involved in the FDTL5 project (LL) had approached colleagues in the Business School for volunteers to be involved in case studies. The staff approached had previously completed questionnaires on approaches to assessment feedback for the project, one of whom had been DU who lectures tourism in the Business School.

Survey (NSS) in the UK highlights how final year students are "notably less positive about assessment and feedback on their assignments than about other aspects of their learning experience" [Williams and Kane, 2008, p. 2]. From data collected, the ESWAF project has also uncovered students and staff having different understandings of what feedback 'means' and how they should engage with each other to give and receive it. As will become apparent, the case study focused upon in this paper discovered limited awareness on the part of the students that feedback is part of the learning process.

Following consideration of the more specific case study findings, the paper describes how the case study was followed-up by the introduction and evaluation of workshops in the Year 1 Tourism PDP curriculum. The paper finishes by considering ways of optimising feedback throughout the PDP undergraduate curriculum,[4] so that tourism students leave university as self-regulated learners who can genuinely use feedback for their own benefit and understand its value.

Case Study Phase of the FDTL5 Project

To understand and conceptualise the processes of student engagement with assessment feedback, why students engage (or not) and how that engagement can be enhanced, an important element of the FDTL5 project has been the investigation of different methods for giving feedback, taking the form of individual case studies. With no ideal single method, an important aim for the project was to explore the range of student engagement through different case studies in various contexts. The duration of each case was one term (or semester), and involved undergraduate or occasionally post-graduate students taking business-related modules. The students' and tutors' experience and their engagement with the feedback process were investigated using qualitative and quantitative methods including questionnaires and interviews. The cohort numbers ranged from 37 to 329. For a summary of case attributes of the first phase of seven cases see Appendix One.

Two case studies were undertaken from the University of Bedfordshire's Business School, one from within the undergraduate Tourism Field. The tourism module forming the basis of the case study was a Year 1 personal development planning (PDP) module,[5] though subject contextualised mod-

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[4]   These further curriculum developments should be regarded as 'work-in-progress.'

[5]   The significance of the module being PDP-based in the early days of the case study was not realised. The PDP process was not seen initially as so potentially intertwined with the whole process of creating awareness in students of assessment feedback, or helping students to learn about the benefits of engaging with the process, the subsequent conclusion from the case study.

ule, and a core part of the curriculum. Students on the module were studying BA (Hons) Travel and Tourism or International Tourism Management degrees, or a Foundation degree in Travel and Tourism. Eighty percent of the students were female, averaging 20-21 years of age. In terms of educational background and nationality, the mix of students taking this module has changed annually over the past four years. Three years previously for example, the cohort consisted mainly of EU UK students (90%), two years ago there was a sizeable international group of Chinese students, and now the majority of the students are Eastern European (mainly from the Baltic States). Thus, of the 81 students initially registered on the module, 50 were Eastern European, 9 were international (outside EU), and 22 were British. Anecdotally, it was felt that students coming from different educational backgrounds/systems seemed to approach writing about themselves in relation to their studies differently.

Assessment and Feedback Strategy in the Tourism Module

When designing the assessment strategy for a module, often it is hoped that feedback from an early piece of related work and other opportunities for feedback (e.g. on written drafts) will feed-forward into the final summative assessment in the module, thus developing student learning. Such an outcome is strongly supported within the literature, for example, "Formative assessment should be an integral part of teaching and learning in HE and 'feedback' and 'feedforward' should be systematically embedded in curriculum practices" [Nicol and MacFarlane, 2006, p. 199]. The expectation is that students will engage in the process, avail themselves of feedback opportunities, act upon comments and most importantly, learn from the feedback. This was the assumption made in the Tourism module, where there were two assessment points: a reflective essay submitted in Week 5 (of a 15 week semester) and a final portfolio. The assessment brief indicates to students that: 'This reflective essay assessment is worth 25% of your final grade and should help you succeed in your final assessment provided you come to discuss the feedback.' From personal experiences students had to identify and discuss perceived strengths and weaknesses, with reference to the skills required to successfully complete an academic course in tourism. The students give examples of skills developed, comment on skills they perceive as strengths and weaknesses, and how they might develop their weaknesses. What would they like to achieve at the end of their studies, and what skills do they think they'll be able to develop? The essay task was designed as the first stage in the students preparing their final portfolio (worth 75% of the module grade).

For the portfolio, students had to demonstrate application of a range of academic and study skills across their first semester of study and describe their own strategies for developing their learning and performance. They were encouraged to include evidence from the full range of skills covered in all their modules. The assessment brief emphasised that: 'The best way to demonstrate your progress is by creating, keeping and updating a portfolio, i.e. a file where you keep together relevant information about yourself' [Cottrell, 1999]. This is an on-going process, rather than a one-off activity. Students were reminded of the importance of reflecting upon work carried out weekly in the module and encouraged to keep full records in order to have ample activities, tasks and examples to discuss. Thus, in essence, both assessments are about skills students possess; the first an essay about the skills brought with them to the University from previous education/ experiences, and the second, a portfolio about skills acquired whilst at University.

In response to the national initiative, in 2001 the University of Luton (as it was then) revised its undergraduate curriculum to address the linked issues of student access, success on programme and progress beyond graduation. Many of the students were non-traditional, resulting in a need to empower them all with skills and experiences that would transfer to future careers of potentially frequent change and continuous learning. Students in Years 1 and 2 in most programmes consequently had dedicated personal development planning core modules. It was hoped that students would be helped to 'become more effective, independent and confident self-directed learners … [and] articulate personal goals and evaluate progress towards their achievement' [QAA, 2004, p. 1]. Since these early days, the now University of Bedfordshire, supported by its Centre for Excellence in Teaching and Learning, has been evaluating the impact of embedding PDP processes in its curriculum with initial conclusions pointing to much potential through such an approach [Atlay, 2008].

The Tourism PPAD module at Year 1 concentrates on the development of academic skills and establishes the PDP process, introducing students to the concept of transferable skills and demonstrating their value within tourism sectors. Students are also given the opportunity to develop personal approaches to study, building on strengths and eliminating weaknesses, and developing ability to transfer learning from one context to another. At Year 2, the students are expected to develop further, to enhance their career-related and employability skills through interactive exercises, group activities and individual reflection. These processes are problematic and unnatural to many students, differing to experiences in more traditional subject-based modules. The focus falls on students themselves, being asked to reflect on their own approaches, learning styles and skills; no textbook shows what

works best for them, thus a degree of self-discovery is required. One student commented after feedback was sought from the module in the previous year that he never wrote about himself; consequently his reflective essay was very theoretical and focused on education as a process, rather than on his personal skills. Figure 1 summarises the feedback process in the module.
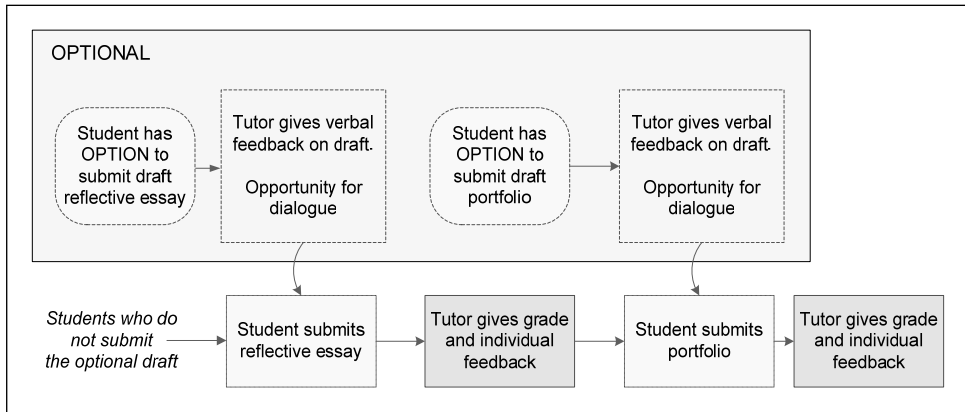

Figure 1. The assessment / feedback process in the Tourism PPAD module
Source: [Handley et al, 2007].

Following the submission deadline for the reflective essay in Week 5 of a 15 week semester, written feedback was structured according to the assessment criteria, general comments were entered on the University's proforma, and text was annotated. Feedback with grades was released in Week 8 on an individual basis, students being asked to come to the tutor's office to collect and discuss their work preferably during office hours (advertised on the Blackboard VLE and in class).

Further written feedback/dialogue opportunities were available if more detailed follow-up was requested or students had questions. During this period the tutor also referred students to support services (English Language or Study Skills Support) if warranted. Occasionally additional work was recommended following some 'informal diagnostics'. For example, one student with a high standard of work but far removed from the task set needed to see for himself where he had gone wrong rather than take criticism from the tutor, however constructive this might be. Thus, the student was asked for a self-assessment to follow the guidelines and assessment criteria (duly successfully submitted). By Week 11 the tutor posted grades on the University's Blackboard Virtual Learning Environment (VLE) thus giving some indication of performance to students not collecting their work. This practice was not followed any earlier due to a fear that fewer students would turn up to collect their feedback.

The Case Study Investigation

The case study investigated the extent to which students engaged with and built upon feedback opportunities prior to the submission of the portfolio, thus examining what could be described as a fairly traditional and straightforward feedback method, and testing assumptions held that this process indeed works, focusing upon the following questions:

- *did students utilise feedback opportunities available (e.g. collect feedback from first assignment and/or submit drafts of the final piece of work) and if not, why not?*
- *how useful was the feedback from the first piece of work?*
- *did the portfolios show any evidence of the reflective essay feedback having been taken on board?*
- *did students within their portfolios explicitly mention 'learning' from the feedback from the reflective essay or more generally from any other feedback e.g. on drafts?*
- *did students utilise any feedback from this module in other modules?*

The case study explored these questions largely through the experiences of staff and students on the module, and through examining the graded work of students – for content, feedback given, but primarily for signs of usage of feedback from the essay in the portfolio. The questions around the utilisation of feedback opportunities (first bullet point) became more significant than anticipated due to the extremely low and disappointing take-up of opportunities to obtain feedback on written drafts prior to the portfolio submission.

The content of all submitted reflective essays (n=74) were analysed to determine if students specifically mentioned feedback from their reflective essay in their portfolio. Whilst the assessment briefing informed students that the first piece of work was related to the second, students were not specifically told to mention feedback from the reflective essay within their portfolios. It was felt that this would be a fairer test of students' recognition and understanding of the relevance of the early feedback, preferring them to select the areas and issues that helped them without any prompts.

Twenty-five percent of portfolios (+ associated reflective essays and academic grade profiles) were selected for fuller content analysis (n=16), prior to any scrutiny of portfolios. For example: Were elements identified for improvement in the reflective essay taken on board in the portfolio? From feedback comments on the portfolio – were the weaknesses identified in the reflective essay reoccurring? Did the student in their personal statements consider themselves to have acted upon suggestions, and had they? Had the student explicitly mentioned the feedback from the reflective essay and any learning from the feedback in their portfolio personal statements? Follow-

up interviews were undertaken with five of the sixteen students whose work had been selected for fuller content analysis, largely selected on availability – all phone contact numbers were tried and messages left if no response. Five areas were covered in the interviews: students' learning experience in their first year at University; learning and progress within the PPAD module; the PPAD module assessments; views on feedback; and, support from staff in modules. The tutor had been interviewed previously by the project's research officer as part of the sample of Business School lecturers being interviewed for the project. The transcribed interview material was read and re-read, and emerging themes detected [see Miles and Huberman, 1994].

Case Study Findings

The case study had focused upon five questions (see above); these will now be briefly addressed with the exception of the first that requires greater exploration.

Did students utilise feedback opportunities available (e.g. collect feedback from the first assignment and/or submit drafts of the final piece of work) and if not, why not?

The main aim of the case study had been to determine the extent to which students engaged with and utilised feedback opportunities, particularly feedback from the reflective essay. Where this was concerned, an unexpected inconsistency emerged in terms of students availing themselves of feedback opportunities.

Eighty-four percent of students (n=63) collected feedback on their reflective essay, a higher proportion than would normally be expected, estimated at around 50-60% in other modules. As this reflected the pattern from previous years, it was suspected that it was due to: firstly, the essay being the first piece of assessed work for these students at the University; secondly, the students being told within the assessment brief that: 'This reflective essay assessment is worth 25% of your final grade and should help you succeed in your final assessment provided you come to discuss the feedback'; and thirdly, because grades were unavailable until later in the semester. A student recalled: 'what she [tutor] did was if you want your grades, if you want your paper you should come and see me and I will give you feedback. I think that is what all the professors should do' (Student-1). Twelve students did not collect their work, this being attributed to grades being available from the University's Blackboard VLE from Week 11 and to withdrawals from the institution or internal programme transfers.

By contrast, the number of students submitting drafts was very disappointing and much lower than expected (n=3), even though students had been openly encouraged to do so at several points in the module. Normally the 'feedback on draft' opportunities take-up is between 20-30%, rather than the 5% in this instance. The opportunities not being compulsory was identified as one major reason for the low submission rate. Nothing conclusive emerged from the interviewing as to reasons, though most students admitted to being aware of opportunities. One student felt she already had an adequate understanding of the task through the guidance given about the task, and had stopped the tutor in the corridor with specific questions (St-5). Many other students used this strategy to ask questions, for example, 'have I understood the task?'; 'is it ok to include a, b, c?'; and, 'do I write in the first or third person?' in other settings such as the stairs, corridors and even in the toilets. The tutor recalled her dismay when a student asked if she could talk to her through the cubicle door, when she was otherwise engaged! (See the cartoon of this scenario developed – Appendix Two). On asking another student who had also approached the tutor in the toilets and not in the office, why?, she was told 'we are more on the same 'level' there'. Emerging from the case study has been the need to understand the part played by a range of informal sources of feedback in student learning (as opposed to formally meeting with the lecturer in the office setting), and how this can best be managed. And, equally, why do students make efforts to engage with some forms of feedback, but not others?

It also became clear that the 'submission of drafts' element was largely sabotaged by the timing of such opportunity, just before the Christmas break with the majority of students in the module focusing on returning to their homes abroad (and sometimes early), and drafts not being in a ready state for submission. This was supported by interviewed students, for example, two (St-4/ St-5) admitting to leaving inadequate time to submit a draft.

Another reason for the non-submission of drafts was the apparent clarity of the brief as illustrated by one of the interviewed students above (St-5), and the impression gleaned by the tutor when students informally asked questions. Some students said that the brief was very straightforward and detailed, thus they saw no need for feedback/ further guidance.

A reluctance to ask questions emerged. For example, as one interviewed student revealed:

> a lot of the students here are European students and if they want to ask something you know, they don't know how to ask it. They are confused like, 'how should I go and ask the teacher about this?', because I have many friends here who are like – 'I don't know how to ask her about this' (St-3).

It became clear that at least on starting their University careers many students lack confidence or even fear asking questions, as this might give the impression of being critical of the lecturer or appearing unintelligent. Some students dismissed the opportunity on the grounds of unfamiliarity with the process and not expecting the tutor to be giving feedback. One student the tutor recalled in her interview, was: 'thanking me as if I did something very special just for them, so I was taken by surprise and felt obliged to explain that's what my job is about and I would do it for any student who asks for it'. Thus, though wary of generalising, the cohort mix and in particular the Eastern European influence probably impacted upon usage of feedback opportunities.

How useful was the feedback from the first piece of work?

The majority of students appeared to act upon the essay feedback if collected but to varying degrees as evidenced in the sample of student work scrutinised: one student did not; some did minimally; and others much more evidently. Many appreciated both the written feedback and the explanations given through dialogue with the tutor, and had found the feedback particularly useful in terms of mistakes made. For example, one student interviewed who failed the assignment responded: 'Yes, I went to see x [the tutor] – I like that because she said to me you did this well but missed this one and this one and she mentioned things. I didn't put references' (St-4). He continued that at 'the end of the first semester I can clearly see my weaknesses and strengths' and it was clear from looking at the personal statement, that though the student still had problems in written English, he had recognised this and had sought out and used some of the available support mechanisms.

Did the portfolios show any evidence of the reflective essay feedback having been taken on board?

Many students had clearly worked on areas delineated as weak; for example, a student whose 'writing style was unclear and awkward' in the reflective essay received a comment on his portfolio – 'major improvement since last essay'. By contrast, mistakes were being repeated but even then, in a few cases, some of the feedback was taken on board. Of the students interviewed, the one with the biggest grade differential (3rd class grade to a 2:1 grade) attributed her improvement to tutor feedback (clearly evident from comparing the content of the two assessments and from the personal statement): 'I have to learn how to gain from my mistakes in order to use

them for my good and make progress in the future'. She strongly agreed that feedback on the module had helped her to understand where she was going wrong. Interestingly, what she does tend to do is 'look at a friend's graded essay [if a very good grade] and learn from that … that's one of the best things and I did this when finding out I only got a 6 [D] in my essay. I could clearly see the difference in terms of what I did wrong' [this had largely been a misinterpretation of the reflective essay task] (St-5).

Did students within their portfolios explicitly mention 'learning' from the feedback from the reflective essay or more generally from any other feedback e.g. on drafts?

The relatively low explicit reference to learning from earlier feedback was surprising, though it was possible to tell by other means that many of the feedback written comments had been acted upon. Is it possible that students – certainly at the start of their university career, are not that aware of feedback being part of the learning process? The assessment task asks students to 'describe your own strategies for developing your own learning and performance', but many had not made that connection at least explicitly.

A reoccurring theme from students who did make the connection was the particular usefulness of the feedback in pointing out mistakes and weaknesses, as the following student illustrates (St-7):

'Very useful in my self-development were feedbacks from my assignments. Especially, feedbacks on PPAD were very detailed and clear. I have read it and looked through the whole of my work and all my tutor's notes. I made some of my own notes and I will not repeat my mistakes in the next assignment (I mean in this one). This examination and consideration of my mistakes have developed analytical and critical skills'.

Did students utilise any feedback from this module in other modules?

Encouragingly, several of the students in their personal statements commented upon the impact of this module (learning from the content, activities and feedback) on other modules within their programme and on their experience as a whole, something possibly arising because this was a PDP module. For example, one student believed that the: 'module helped me to focus on the learning process and gain the most from the first semester (in comparison with other three modules)' (St-11). In many ways, in preparing their portfolios, students were having to consciously think about their own strategies for developing their learning.

Key Finding

The finding that a high proportion of the Year 1 students in the module did not appear to recognize feedback received as part of their learning process was somewhat surprising and perplexing. Throughout the case study it had become increasingly apparent that many of the students on the module lacked familiarity with feedback processes, did not know how to ask appropriate questions or indeed if they should, and furthermore were unsure what to do if they had been experiencing problems with their feedback. As well as not knowing how to ask appropriate questions, some students did not want to be seen to be challenging 'authority' when either unsure of a task set or when questioning a particularly unexpected grade. Additionally, for some students, receiving and using feedback was not recognized as part and parcel of the lecturer's job.

The Potential of PDP Emerges for Optimising Feedback

As a result of this apparent limited awareness of the potential of feedback, it seemed that 'learning about assessment feedback' could be included in Year 1 PDP-related modules and thus, firmly within the curriculum (in the institution's case). After all, an essential aim of PDP and employability is to develop students' self-awareness and understanding of what and how they are learning. So, whilst the typical PDP module at Year 1 in the Business School covers for example, 'referencing and plagiarism', 'essay and report writing', 'information retrieval', and 'presentation skills', why not take the opportunity to formally develop awareness in students of the importance of engaging in assessment feedback and even integrate this into the assessment strategy? The question was posed: What is the potential of PDP processes in creating awareness in students of assessment feedback, and the value of engagement? In both of the University of Bedfordshire's case studies[6], after all, the potential of PDP had been recognised in preparing students to be more aware of the importance of feedback in the learning process. A discussion day organised with other ESWAF project case study participants at Oxford Brookes University to compare findings acted as a catalyst in the decision taken to follow-up the case study by introducing and evaluating 'Getting the most out of the assessment process' workshops in Year 1 PDP curricula in 2006-2007 (in two fields, one being Tourism). Doing so would acknowledge the importance of, and formalise this key element in student learning and progression. It was clear from the case study that

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[6] See the second case study – Case Study 4 – [ESWAF, 2007b]

'students need *more* guidance during their first semester at University to help them understand what feedback *is*, and how they can use it' [Handley et al, 2007, p. 13]. This supports Atlay's notion of a 'true PDP curriculum' in which 'students' self-awareness, their ability to use feedback and to take responsibility for their learning and development will all be emphasised – at all levels' [Atlay, 2008, p. 3]. Atlay earlier advocates that, *'students taking responsibility for their own learning and development, in a structured and supported way, should be at the heart of any approach to PDP'* [pp. 2-3].

Introducing the 'Getting the Most out of the Assessment Process' Workshops

The two hour workshops introduced into the curriculum of the PPAD module was designed to focus upon creating awareness in students of the value of engaging with assessment feedback as part of the learning process, also aimed at raising awareness and empowering students to ask appropriate questions, and to encourage reflection, critical in creating lifelong learning [Hinett, 2002]. It was hoped that by the end of the session students would have: a clearer understanding of the assessment process; and a clear understanding of assessment feedback and the importance of using assessment feedback to help in their learning. The workshops were held half-way through the module, thus, after the reflective essay had been submitted. The students also experienced an example of receiving and using feedback in a session where they discussed receiving feedback on a piece of work they had submitted for a referencing task.

Within the workshop, students were encouraged to think about the feedback they received and what it meant to them, rather than just not collecting, reading and ignoring, and did they understand why they obtained the grades they did? They were encouraged to try to compare feedback from different modules and reflect on what this meant for their own development. Importantly, the 'right to receive feedback' was emphasised and if they did not and/or the feedback was unclear or not understood, they should ask and seek explanations. Practical activities included exercises on 'asking appropriate questions'.

Impact of the Workshop

To assess any impact of the workshop in the tourism module, some of the FDTL5 2005-6 case study data were compared to new data collected in 2006-2007 from content analysis of the final portfolio assessment in the module.

The focus was on the fourth question from the original study: "Did students within their portfolios explicitly mention 'learning' from the feedback from the reflective essay or more generally from any other feedback e.g. on drafts?" At the time of the previous content analysis of student portfolios, the relatively low explicit reference to learning from earlier feedback had been surprising with only 13% [n=63] of students from 2005-2006 appearing to recognize feedback received as part of their learning process. As in the previous year, in any briefing about the portfolio content, no mention was made that feedback should be included. Thus, rather reassuringly, 57% [n=44] of students who attended the 2006-2007 workshops mentioned feedback in portfolios suggesting that the workshops had indeed impacted upon students' awareness of feedback. Quite a few of the students wrote in their portfolios about such awareness, and of through engaging with feedback becoming more self-critical and reflective as illustrated by the following two students' comments:

> 'Feedback is very important thing in my life now, because it is the way that guides us to success in our future. You read it and next time you are trying not to make the same mistakes again. You communicate with your lecturer through it and try to understand what he/she wants from you. So after my … first ever feedback I was forced to improve my writing skills' (St-28).

> 'To reflect upon previously done work was something I wasn't used to do. Therefore receiving a feedback from tutors as well as from classmates helped me to start critically evaluate my work and to which extent I fulfilled my goals' (St-19).

One of the questions Atlay [2008, p. 4] poses in advocating PDP as 'a structured PDP process' is: Do students self-assess their abilities in relation to the task and consider how they might improve? This was something identified by students, for example:

> 'Feedback has become more important to me through this semester …. it has helped me to get a better grade, but it has also helped me to evaluate my own work. What I mean by this is that I can look at my work and see how I could improve it before hand it in' (portfolio-17).

Some students identified that their ability and confidence to seek feedback and ask questions, from a range of sources, had improved for example:

> 'I have learnt to ask lecturers for help, especially before submitting my final drafts of my assignments, and I regularly ask my lecturers to go through my assignments in case if I missed vital information or if I have included unneces-

sary information… This helps me to improve my work and knowledge. I have also started asking friends and families to proof-read my work, which I couldn't do before. I was afraid that people would laugh or make fun of my work but since starting this degree, I'm proud to say that my self-esteem has increased enormously and I'm no longer afraid or shy to ask anyone for help. I believe that asking them for help could also contribute to their own personal development and it can also build their self-esteem and problem solving skills' (port-22).

This apparent reluctant prior behaviour illustrated above raises questions about the need to encourage students to feel that they are members of an academic community where the norm is to discuss one's work in a relatively open, informed and scholarly manner [Handley et al, 2007]. They describe this initiative as being "a way of enabling students to become what Lave and Wenger [1991, p. 13] would call 'legitimate peripheral members' of the academic community of a University".

Conclusions: Optimising Feedback Throughout the PDP Undergraduate Curriculum

The case study and the follow-up research have focused upon the first year of the undergraduate curriculum identifying a need for greater support to be given to students in terms of creating awareness of the potential feedback has, and helping them to understand the role feedback can play in supporting their learning. The question remains and currently being followed-up is: 'how can feedback be optimised throughout the PDP undergraduate curriculum, thus also in Years 2 and 3, so that tourism students leave university as self-regulated learners who can genuinely use feedback and understand its value'? Atlay [2008, p. 1] believes that:

> 'It is the notion of ensuring that students can locate themselves in relation to an ever changing external environment and that they have the necessary abilities and attitudes to control their own learning, and hence to manage to some extent their own destiny, which is at the heart of PDP processes'.

It follows that a Year 2 PDP curriculum should be about reinforcing awareness and 'deepening learning by thinking about feedback', one of several dimensions of metacognition [Race, 2005]. Students should be encouraged to ask appropriate questions and increase use of feedback. Critical thinking should be encouraged coinciding with the transition to less tutor-led and greater peer- and self-feedback, and 'management of tutor' strategies. With workshops now having been embedded in the Year 1 Tourism

PDP curriculum aiming to raise awareness and empower students to ask appropriate questions, work is continuing on developing ways of optimising feedback throughout the PDP undergraduate curriculum. As a result of evaluating the Year 2 curriculum in Tourism [see Petrova and Ujma, 2006a, 2006b] for example, more self and peer-feedback activity has been incorporated within the Year 2 Tourism PDP module. It is hoped that just as in the example that follows from one of the Year 1 students, students in Year 2 will routinely realise the importance of learning from others and of giving others feedback:

> 'It [feedback] has also helped me to look at other peoples work, for example `when doing a group work. At the moment I have to work in group to make a marketing plan for the 'x' module. This has required a lot of editing and giving feedback to one another. Not only has this helped me to evaluate other people's work, but to work in a group and communicate so that we can work as a team to improve our assignment' (port-20).

Involvement in more peer-feedback activities has real potential to help students gain insight from another perspective in terms of not only being a recipient but being the one to give feedback, but such activity has to be facilitated and supported by the tutor. Kumar [2007] points to the need for sensitivity, constructive and advisory feedback and that "students learn to do this in such a way that the person they are speaking to understands what they are saying, accepts it, and can do something about it" [pp. 69-70].

Following this type of progression from Year 1 to Year 2, usage of feedback should then be prioritised at Year 3, students having previously understood its value, but now expected to recognise the need for much learning to be intentional, another characteristic of lifelong learning [Knapper and Cropley, 2000]. By Year 3, students should be taking control of their own learning [Biggs, 1985 cited in Jackson, 2004], thus developing into self-regulated learners [Jackson, 2004]. Tourism students should be leaving university as self-regulated learners who can genuinely use feedback and understand its value. Learning will hopefully continue and be evident in all spheres of post-University life whether in work or leisure – thus embracing the notion of lifelong learning, and being a member of a 'learning society' [e.g. Watson and Taylor, 1998].

It seems clear that course teams could be doing more to support students in this process right from the start, whether this be through induction and orientation activities when students first arrive at the University, and/or as is the case where PDP is integrated within the curriculum, doing so through the curriculum itself. Engaging with assessment feedback, as is widely recognised, plays such a key part in student learning and subsequent attainment.

Raising awareness and to some extent empowering students where feedback is concerned could be seen as constituting the foundation stage in an evolving three-tiered pyramid model at undergraduate level. This culminates in self-regulated graduates who leave the university and recognise the importance of feedback in all facets of their life, in all shapes and forms – formal and informal, anticipated and unanticipated, and use feedback.

'Are students helped to make connections between what they learned in the activity [PDP] and future planned activities or the world beyond their current course? This might be in their personal life, in future study or in employment' [Atlay, 2008, p. 4]. Or, do students recognise that learning how to use and respond to feedback does not stop when no longer at their HE institution? Feedback features in employment contexts; using and responding to feedback is to be encouraged in employment even though, it is recognised

Appendix One: Summary of key attributes of the seven completed case studies in the FDTL5 'Engaging Students with Assessment Feedback'

Case ref	Year	Cohort number	Module title	Teaching method	Key feature of assessment/ feedback method	Feedback from:		
						Self	Peer	Tutor
1	3rd UG	111	Business in Context	Lecture + tutorial	Verbal and written feedback given on draft assignment. Student focuses on re-writing targeted areas			x
2	1st UG	74	Personal Professional and Academic Development in Tourism	Workshop with occasional lecture	Feedback on draft offered to all students			x
3	1st UG	78	Critical Thinking	Workshop	Exemplars; student self-assessment and action planning.	x	x	x
4	2nd UG	37	Sporting Cities	Lecture + tutorial	Experiment: feedback given before or after communicating grade			x
5	3rd UG	64	Marketing Issues	Workshop	Peer review in class time, facilitated by tutors		x	
6	2nd UG	114	Communication and Time Management	Lecture	Student self-assessment and action-planning on self-development	x		
7	1st UG	329	Organisational Information Systems	Lecture + tutorial	Comparison of student perceptions of peer and tutor feedback		x	x

Note: 'Tutorial' denotes small-group discussion following lecture or relating to a specific task; 'Workshop' denotes activity-based teaching

Source: [Handley et al, 2007].
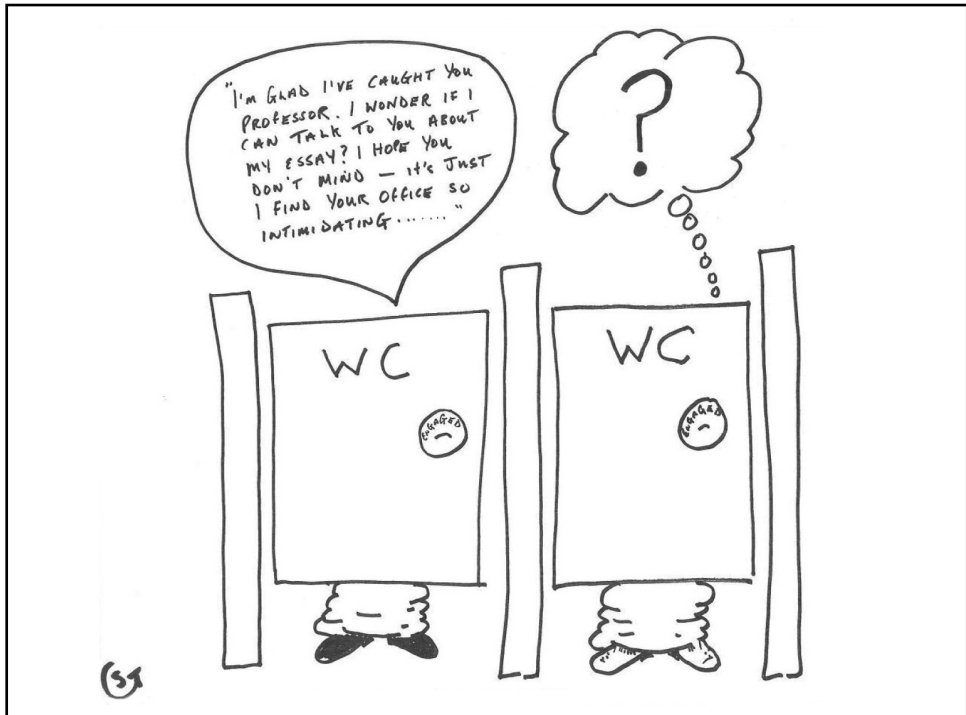
Appendix Two: Case study toilet scenario cartoon

Source: Cartoon acknowledgement – Sean Gammon [ESWAF, 2007b].

as 'a tough old thing: everyone says they're desperate for more if it' – until it's given [Frost, 2007, p. 3]. The learning process is not always smooth and easy – sometimes it is quite painful and through PDP processes whilst at university, students can be helped to deal with both positive and negative feedback scenarios during and post-studying. 'Giving and receiving feedback should be explained as an important (but often difficult) interpersonal skill that everyone has to use at times in real life and at work' [Kumar, 2007, p. 69].

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PART III

EPILOGUE – THE ROLE OF "MASTERS" (EMINENT SCHOLARS) IN CONTEMPORARY SCIENCE – THE CASE OF TOURISM STUDIES

PROSPECTS FOR THE CRITICAL STUDY
OF TOURISM AND THE ROLE OF MENTORS
IN ACADEMIA

*Sabina Owsianowska**

Abstract: Trends in present-day academia encourage the blurring of boundaries between disciplines in order to gain reciprocal, creative inspiration and a blend of various paradigms, with the aim of achieving a fuller description of a complex, multidimensional reality. Tourism studies are in essence interdisciplinary and involve the participation of representatives from many areas of knowledge, who draw from theory and research tools that are developed within the framework of established disciplines such as sociology, economics, business management, psychology, geography, art history, etc. Outstanding academics contribute to progress in education, and their experience makes it possible to critically examine current issues. This opens up a space for exploration, reciprocal inspiration and dialogue for researchers from various traditions, schools and generations who analyze the phenomena of contemporary travel.

Keywords: critical turn, mentor, tourism studies, paradigm, qualitative research.

Introduction

Trends in present-day academia encourage the blurring of boundaries between disciplines in order to gain reciprocal, creative inspiration and a blend of various paradigms, with the aim of achieving a fuller description of a complex, multidimensional reality [Geertz, 2000, 2005; Denzin, Lincoln, 2009]. Tourism studies – even if we acknowledge that they fulfill all of the criteria for an autonomous field of study [Hall et al., 2005, p. 8] – are in essence interdisciplinary and involve the participation of representatives from many areas of knowledge, who draw from theory and research tools that are developed within the framework of established disciplines such as sociology, economics, business management, psychology, geography, art history, etc. [cf.: Tribe, 1997, 2006; Winiarski, Alejziak, 2003; Alejziak, 2008]. Outstanding academics, leading the way in research in the field of tourism, contribute to progress in education, and their experience makes it possible to critically examine cur-

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rent issues. This opens up a space for exploration, mutual inspiration and dialogue for researchers from various traditions, schools and generations who research the phenomena of contemporary travel.

The following professors have been invited from foreign and Polish research centers to share their views on the role of mentors in academia, specifically in reference to tourism research: Richard W. Butler (UK), Erik Cohen (Israel), Graham M. S. Dann (UK, Norway), Grzegorz Gołembski (Poland), Metin Kozak (Turkey), Stanisław Liszewski (Poland), Andrzej Matuszyk (Poland), Douglas G. Pearce (New Zealand), Philip L. Pearce (Australia), Krzysztof Przecławski (Poland), H. Leo Theuns (Holland), Ryszard W. Winiarski (Poland), and Arch G. Woodside (USA). They suggest discussing the roles of experts, teachers, professors, outstanding researchers, or simply researchers who are "more advanced in age," rather than using the term "mentor" [cf. appendix]. They thus present the question of the various possible cultural connotations of the concept of "mentor," and the difficulty in defining this term. Undoubtedly, in this way they are also expressing modesty and distance from themselves and their scholarly achievements. The question of who qualifies as an academic mentor has been explored in an article by W. Alejziak (in this volume). The present study describes, first of all, prospects for the critical study of tourism. The aim, length and nature of this article, unfortunately, only allow for a general presentation of a few aspects of these developments. Secondly, this paper attempts to summarize experts' views on the importance of outstanding researchers and their accomplishments in forming and transmitting knowledge, in educating students, and in creating and upholding the scholarly ethos.

From the Pioneers of Tourism Research to the "T Generation"

First of all, it is worth asking whether the role of an eminent researcher – a mentor – in the field of tourism differs in any specific way from that of professors in other academic disciplines. If we answer in the affirmative, it is necessary to specify what these differences consist of, and where they originate. This is one of the topics touched upon in the statements cited below, reaching back to the beginnings of tourism as an academic discipline. The situation of the pioneers in tourism studies was accurately described by Jost Krippendorf (who later abandoned this field of study for ecology) when he wrote, in the preface to his ground-breaking book *The Holiday Makers*: "When I tell people that thinking about free time and tourism is my profession, they often laugh. Quite frankly, they don't consider it as a serious

occupation, as work, and only work can be treated seriously" [Krippendorf, 1987]. This is why the first "warriors of tourism," or "daring individualists" [see: P. Pearce, E. Cohen, G. Dann – appendix] not only blazed new analytical trails within established disciplines and introduced tourism into academic discourse. As the cited statements show, it was, above all, necessary for them to overcome resistance and the tendency to trivialize the phenomena that they were analyzing.

The dynamic development of tourism in the second half of the 20th century surprised representatives of the social sciences. They did not anticipate that this "individual consumer behaviour" would become an important factor shaping social and cultural life [Franklin, Crang, 2001]. However, by the early 1970s, recognized sociologists and anthropologists from the so-called "first generation of tourism scholars" began to expose the limited and superficial treatment of tourism [cf. Jamal, Kim, 2005; Nash, 2007]. In the following decades, research that was carried out was institutionalized to a much lesser degree than at the beginning of the 21st century, and critical views were, in general, less integrated. The second and third generations of tourism researchers have attempted to build a more coherent field of knowledge, within which the divisions between various standpoints towards the phenomenon of tourism would be reconciled. This stance expresses that "the world does not present problems in the convenient package of a given discipline. Problems appear as a complex, multidimensional and often confusing accumulation of issues" [Greenwood, Lewin, 2009, p. 91]. The current wave of criticism is beginning to involve increasing numbers of people from the so-called "T Generation," whose educations and academic careers are intrinsically connected with tourism research [Hollinshead et al., 2009; see: Dann, P. Pearce – appendix]. Nowadays, although the institutionalization of tourism studies is of undoubted importance, many problems have nonetheless remained unresolved. Researchers studying the fundamental question of establishing tourism studies as an autonomous field of research express the conviction that it is possible to build a "monodiscipline knowledge base" which would be used within the framework of interdisciplinary projects [see: Theuns – appendix], and praise post-disciplinary approaches as the best solution [Coles et al., 2006; Hall et al., 2005; see also: Alejziak, 2008; Tribe, 2010]. Graham Dann draws attention to the fact that the continuing development of tourism studies inspires hope for its progress, but only to a certain degree. There is a "theoretical deadlock" shown by the almost unshakeable foothold held by basic paradigms such as authenticity, otherness, play and constructivism, which have arisen primarily in Western European, English-speaking culture [see: Dann, 2011a; Dann – appendix].

Due to the growing role of technology and general mobility in everyday life, new and fascinating research prospects are opening up in the field of tourism. According to some researchers, such as John Urry [2009; see also: Hall, 2004; Hollinshead et al., 2009], the paradigm of mobility should become the main theoretical perspective in sociology at the beginning of the 21st century. As a consequence, postulates are appearing from a larger pool of information concerning tourist movement, containing analyses of alternative forms of mobilities, both voluntary and forced. Researchers' interests should include the various consequences of migration, working or studying abroad, and ties linking members of a diaspora with their country of origin, etc. This requires a different understanding of society, and thus new definitions of basic sociological categories. On the other hand, the creators of the actor-network theory (B. Latour, J. Law) focused on networks of connections that involve not only people but also non-human entities such as books, media, computers and computer programs, cell phones which enables the use of the Internet, organizations, etc. [see: Johannesson, 2005; van der Duim, 2006; Tribe, 2010]. The main aim of the actor-network theory is to comprehensively analyze the material and immaterial elements that have an effect on the way an individual functions in the world.

Tourism has been influenced by the progress of civilization, which includes the development of new technology; however, this is only one of the main themes in descriptions of contemporary travel. Critical examination of recent achievements has revealed topics which so far have been ignored or insufficiently explored in this branch of knowledge. A major secondary issue has been the way travel affects societies of both travelers and hosts, as well as the cultures that they represent. Since the 1970s it has become increasingly evident that information concerning mass tourism cannot be confined to economic or geographic issues [see: Franklin, Crang, 2001; Urry, 2007]. An important step has been to question the superiority of research from the viewpoint of Western culture, which the dichotomy of modernity regards as central.

Since the beginning of the 21st century, tourism studies have been divided between two fundamental areas of research. The first primarily concerns market issues – the significance of the tourist industry in the regional, national, and global economy. The second trend, dubbed the "new tourism research" [Tribe, 2005], embraces questions that go beyond business and economics, concentrating on the discursive and performative dimensions of social reality. The latter approach has led to the discovery of the ways in which power is wielded in culture, and their more sophisticated description [Foucault, 1999; Aitchison, 2005; Phillimore, Goodson,

eds., 2004; Ateljevic et al., 2007]. Drawing upon N. Goodman's concept of "world-making," researchers are focusing on the formation, deterioration and re-creation of worlds through the tourist industry, (un)conscious of its powerful role. They propose studying the symbolism, iconography and iconology of tourism in a more systematic manner, establishing a program for monitoring the ways in which places, people and cultures are represented, and creating a new model for tourism education [Hollinshead, 2002; Hollinshead et al., 2009].

Researchers have also identified some pitfalls characteristic of cultural analysis. In the intellectual sphere, tourism has become a field so "theoretically expansive" that it has captured "not only the common imagination, but also the sociological and anthropological creativity" [Wieczorkiewicz, Brzozowska, 2010]. Metaphorically understood, travel loses the complexity of the many-sided relationships in tourism, which are closely linked to the ethical, political, social, and economic problems found in multicultural contexts. It is important to note that in cultural analyses tourism often appears detached from the "forces of structural power that characterize twenty-first century capitalism and globalization." As a result, from such perspectives as neo-Marxism, they somewhat overlook the "economic and political relations of power in the contemporary global (dis)order" [Bianchi, 2009, p. 484]. For researchers engaged not only in academic discussion but also in activities promoting equality and social justice, this can hinder them from reaching their goals [Ateljevic et al., 2007, p. 3; Swain, 2009].

The Critical Turn in Contemporary Tourism Studies

The desire for tourism studies to be autonomous can be recognized as one of the main reasons why (post-)positivism is preferred in this type of research, its *scientification* (J. Jafari), since this approach is meant to guarantee academic objectivity, as it is understood in the hard sciences. This is why academics studying tourism have had a delayed response to the breakthrough which occurred in the social sciences in the second half of the 20th century [Belhassen, Caton, 2009]. This new direction in criticism, which was, in a certain sense, the product of the growing role of post-structuralism in academia, was dubbed the "quiet revolution" in tourism research [Bianchi, 2009; see also: Rojek, Urry, 1997; Aitchison, 2001a, 2005; Ateljevic et al., 2007]. The critical tourism studies comprises roughly 150 people who work at various universities around the world. Their cooperation has resulted in several CTS conferences (Dubrovnik 2005, Split 2007, Zadar 2009, Cardiff 2011), the publication of numerous articles and books (i.e. *The Criti-*

cal Turn in Tourism Studies: Innovative Tourism Methodologies, edited by I. Ateljevic, A. Pritchard and N. Morgan, 2007), as well as special issues of academic journals (e.g. *Tourism Geographies*, 2009).

Postmodern paradigms and controversies. Postmodernism is connected to a loss of faith in academia in the second half of the 20th century, and a belief in the necessity of opposing the totalitarian ideologies that tragically marked history of Europe and the world. From an epistemological perspective, this skepticism derives from the questioning of the scientistic approach, and the status of academic knowledge falling into crisis [Lyotard, 1997; see also: Feyerabend, 2001]. This crisis was reinforced by the feminist critique of the theretofore dominant vision of rationality and the universal subject – man as such, only superficially gender neutral – as a reference point for conducting research and interpreting its results [Aitchison, 2005; Owsianowska, 2011a]. Among the main categories deconstructed in postmodernism are identity, gender, difference, and subjectivity. In response to attempts to "decentralize the subject," attention is drawn to the necessity of grafting the newly evolving theories – within the framework of postcolonialism or feminism – into the rational discourses of modernity, with the aim of retaining their significance and power to emancipate [Waugh, 1997; Bradley, 2008]. For it is only in dominant cultures that "the existence of a coherent, autonomous subject was an irrefutable axiom and value at the stage of modernity" [Skórczewski, 2008, p. 48].

Postmodernism is often the object of (completely justified) criticism which primarily concerns revealing the traps and pathologies lurking behind the unquestioning pursuit of anything that is new and fashionable (referred to as "light" postmodernism [Szahaj, 1996; see: Heller, 2009]), and the superficial reflection or adoption of scientific terminology and tools with which to study everyday reality [see: Sokal, Bricmont, 2004]. On the other hand, opinions are often expressed which outright depreciate every concept that can be specified as "postmodern," without verifying its worth or judging the contribution it has made to the understanding and creation of reality.

The rise in significance of qualitative research. The increased importance of qualitative methods and interpretative description in the humanities and the social sciences stems from the validation of such paradigms as constructivism and critical theory [Guba, Lincoln, 2009, pp. 281-292; Denzin, Lincoln, 2009; for a discussion of paradigms in tourism, see: Dann, 2011a]. The concept of paradigms – which, fundamentally, are adopted with the consent of academics – reveals the forces in the academic environment which stimulate

the development of knowledge [Kuhn, 2001]. In addition to paradigms, Tribe [2006] also points out tradition and discourse as mechanisms fulfilling similar functions in tourism studies, although in a less rigorous and restrictive manner. Along with the changes in paradigms, we can also observe attempts to uphold the existing state of things, and to oppose the "academic revolution."

Considering tourism first and foremost as a cultural phenomenon requires researchers to go beyond popular, widespread theoretical approaches, and to question the dominance of tourism study projects that are post-positivist, quantitative and subordinate to business [Pritchard, Morgan, 2007, p. 11]. The growing role of qualitative research also leads to (understandable?) resistance, if, for example, a researcher is called to take a more reflective stance towards his/her own identity, position, ideology, and subjectivity. This requires that researchers determine their standpoints towards various categories and cultural models implicitly inscribed in the way research is carried out, beginning with the most basic rejection of Cartesian mind-body dualism [Veijola, Jokinen, 1994; Urry, 2007, 2009; Owsianowska, 2011a]. The debate concerning the nature of power, discourses and representations indicates the fact that greater attention is being paid to language and other semiotic codes [on the topic of critical analysis in discourse see: Fairclough, Duszak, eds., 2008; Owsianowska, 2011b].

Feminist ideology and the issue of gender. In the study of leisure time and tourism, an important role has also been played by feminist and postcolonial theory. The fact that women were formally granted access to higher education only at the end of the 19th century meant that they participated to a lesser degree in the gathering and formation of knowledge. The deconstruction of the constantly redefined cultural models of femininity and masculinity [Bradley, 2008] demonstrates a centuries-old division of duties and a valuation of the private and public spheres (favoring the latter). Looking at women's leisure time in new ways has enabled people to go beyond theoretical perspectives that were prevalent until the mid-1980s and acknowledge new assumptions which take into consideration the specific historical, cultural, economic and political situation of women and other individuals and groups who suffer from discrimination [Denzin, 2009]. A few decades later, despite the issue of gender having entered the public debate and academic discourse, a lot of progress still remains to be made in this domain. This is especially important since the inclusion of controversial topics in research projects is sometimes merely an expression of political correctness, rather than an adoption of new standards [Olesen, 2009, pp. 377-378]. Furthermore, at the end of the 20th century, developments in gender studies, as with leisure time stud-

ies, began to slow down. The academic isolation of researchers working within their own hermetic circle has not allowed thorough knowledge of gender issues to become prevalent in other fields of research [Deem, 1999; Pritchard, 2005].

Cara Aitchison has drawn attention to the mechanisms of communication, legitimization and reproduction of knowledge in both academia and the world in general [Aitchison, 2001b]. Research and consultations, publications, career organizations, and management of education exist within a system which has always had a patriarchal structure. One of the consequences of this is that there are fewer women among tourism researchers [see i.e. Tribe, 2006, 2009; Ateljevic et al., 2007; Belhasson, Caton, 2009]. A comparison of the number of articles and book reviews written by women and men, as well as the editorial staff of academic publications, shows to what extent women were contributing to knowledge of tourism and leisure time at the turn of the 21st century.

The lack of women among the renowned foreign tourism researchers collaborating on the first and last sections (experts' opinions) of this edition of *Folia Turistica* is thus symptomatic. However it does not mean, of course, that it is impossible to find women capable of being considered authorities in this field. It suffices to remember the first sociological studies of leisure time by Marie-Françoise Lanfant, or the inspirational work of Valene Smith, as well as researchers such as Sue Beeton, Alison M. Gill, Ulrike Gretzel, Karla A. Henderson, Cathy C.H. Hsu, Myriam Jansen-Verbeke, Juanita C. Liu, Gianna Moscardo, Regina G. Schlütter, Pauline Sheldon, Betty Weiler.[1] Nonethless, the list of authors in this volume of *Folia Turistica* certainly reflects the disproportionate gender representation in the formation of knowledge about tourism, which is a result of the abovementioned structure of research and education institutions.

Cultural hegemony and postcolonial theory. One of the consequences of shaking the foundations of the Cartesian subject is that it undermines all possible kinds of metanarration (*metarécits*), "great stories" constructed from a hegemonic position [Lyotard, 1997; for critics of "little stories" see i.e. Habermas, 1997]. This legitimizes the fragmentation and pluralism of approaches, and the equivalence of narratives from particular, individual points of view, especially from the perspective of people belong-

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[1] Mr. René Baretje-Keller (CIRET, Aix-en-Provence, France), well-known for his invaluable contribution to the development and popularization of tourism knowledge, was asked to single out the most highly recognized women involved in tourism research. He stated that, first of all, we are forced to deal with relative criteria, and, secondly, that every attempt to create a list involved the risk of leaving out equally important people.

ing to social groups that usually are not given a voice. The aim of academic research is thus the presentation of various perspectives and the points of view [Geertz, 2005]. The unspoken or distorted ways in which a dominant culture receives and transmits the stories of representatives of various races, nations, ethnic groups, religions, etc., are expressed and reinterpreted in research carried out, for example, within the framework of *standpoint* theories [Humberstone, 2004; see also: Aitchison, 2001b; Pritchard, 2005; Tribe, 2006]. Analysis of the presence of authors from outside of the English-speaking world and beyond the sphere of Euro-American culture [see: d'Hauteserre, 2005; Tribe, 2006; Dann, 2011b] also reveals the cultural and language dominance in academia.

Analyzing Experts' Opinions on the Role of Mentors in Academia

In light of discussions concerning critical studies of tourism, a few questions that have been dealt with by experts seem to be of particular importance. First of all, they draw attention to the dialectic of tradition and modernity in contemporary tourism studies. Secondly, they emphasize the need to promote the results of this kind of research among academics working in other disciplines. Thirdly, they also attempt to describe the characteristics of the mentor-student relationship in education, with reference to the field in question.

The most significant areas of cooperation between experienced and beginning researchers, according to experts, include:
- The possibility of screening research topics and critically examining popular issues, and of giving attention to important but neglected themes [see: Butler];
- Rediscovery of forgotten studies carried out in the past which have not been quoted in recent texts, and thus can be overlooked by younger researchers who make use only of the most current sources [see: Butler; Dann; D. Pearce, P. Pearce];
- Consciousness of how the system of creating and transmitting knowledge functions, and awareness of how to effectively work within this system [see: Butler];
- Critique and identification of the dangers resulting from widespread, easy access to information [see: Butler];
- The setting of requirements and the monitoring of a student's academic progress; content advice and psychological support; aid in establishing contact with scholars from all over the world; collaboration on projects [see: Gołembski, Woodside];

- Drawing attention to the usefulness of activities that are undertaken, and helping to discover financial resources outside of universities for funding research [see: Butler; Gołembski].

Last but not least, an extremely ethical approach to research, honesty, care for one's reputation, and credibility are the most important values in an academic career and when endeavoring to become a mentor, as well as the desire for continual self-improvement.

The dialectic of tradition and modernity. As regards the current and future situation of the tourism market, the role of older researchers is less to set trends, than to examine them. Identification of trends is supplemented by attentive and critical commentary on new phenomena and their consequences. Experience enables a more balanced judgment, and even increased skepticism, which can balance out the excessive enthusiasm that often accompanies students when they take up popular new research topics [see: Butler, Cohen, Gołembski, Theuns – appendix]. It is always a challenge for researchers to follow current developments in academia and to orient themselves within topical issues and theories while maintaining some necessary distance from innovative ideas and possible traps, such as total doubt or relativism.

In the mentor-student relationship, it is very important for there to be reciprocal aid within the dialectics of tradition and innovation, indifference and enthusiasm, experience and naivety, routine and lack of humility, respect and understanding, kindness and inspiration. In this situation the role of mentor also undergoes a change, and includes other roles such as guide and leader, critic and supervisor, boss and adviser. In today's reality, students have different expectations and needs – the challenges that they face differ from those which their predecessors had to deal with. The increasing number of information sources, the ease with which people are able to access information due to technological developments, new tools for the independent verification of up-to-date knowledge, and the shrinking of time and space, all complicate our references to reality from before the era of microprocessors and the Internet, and thus also the *touristification* of the world in the 20th century. A response to the above-mentioned processes should be to change the means of communication between academics: through direct collaboration, at conferences, and through publishing activities [see: Dann – appendix]. On the other hand, certain fundamental characteristics of the mentor-student relationship have remained exactly the same for centuries.

Sapere aude. Immanuel Kant in the text entitled "What is Enlightenment?" (1784) considered the issue of heteronomy and autonomy, dogmatism and critical thinking, which seem to be crucial in the mentor-disciple

relationship. In terms of the education and encouragement of academic staff, a mentor's duties have remained the same since the establishment of universities: care and attention for talented disciples, support and advice to improve researchers' techniques and to encourage them to achieve academic independence, and, above all, respect for young researchers, positive encouragement and the building of self-confidence [Szlachta, 1984; Olbrycht, 1998; Klimczyk, 2002a,b; Neyman, 2005]. In teamwork, fulfilling the role of a leader additionally places on a professor the responsibility of treating a student fairly, and giving up an authoritative stance in favor of an equal and friendly partnership. Young students should receive personal, empathic treatment, in which they are respected as people, and not merely as subordinate co-workers [see: Butler, Gołembski, P. Pearce – appendix].

The desire to become a future mentor is a professor-student relationship model of a special kind. Hidden traps can sometimes lie within this relationship and in this desire to be a mentor. By being self-critical and recollecting past errors and imperfections, a mentor can avoid at least some of these pitfalls. It is also important for the mentor to fully embrace the role of pedagogue, and to have a kind and friendly attitude toward students, as well as an openness toward viewing reality in new ways and sharing experiences [see: Gołembski; P. Pearce; Przecławski – appendix]. Academic output – although a significant basis for the positive assessment of a researcher's work – is not an absolutely necessary condition for acquiring an important position amongst colleagues. Rather, recognition of this exceptional role is determined by students – people who are inspired by the activities, passion and personality of an academic authority who is a worthy role model. (Of course, the ideal situation described above can appear in reverse or in different variants, in which, for instance, a mentor becomes a figure restricting autonomous research and independent thinking, particularly when he/she does not allow a student to "grow beyond" him/her [see: Matuszyk; Winiarski – appendix].) A mature academic bears a huge responsibility connected, on the one hand, with his/her contribution to the development of a given branch of knowledge, and on the other hand with serving as role model. This goal can be achieved by turning oneself into an example which involves diligence, honesty, making demands towards oneself, and observing high ethical standards (particularly in times dominated by the principle of "publish or perish") [see: P. Pearce; Matuszyk – appendix].

Academic cooperation within the framework of tourism research and beyond. The status of tourism research at the beginning of the 21st century has not yet been established, as was already discussed

above. In Poland, tourism studies are carried out within four basic disciplines – economics, geography, sociology and studies of physical culture. The list of branches of knowledge from which theoretical and methodological inspiration is taken, however, is much longer. Tourism experts' primary aims are to bring conclusions drawn from tourism research into academic and public discourse, and to transmit and popularize work carried out in this field. The first studies dedicated to tourism appeared in the 1920s and 30s [see: Podemski, 2005], and over the course of nearly one hundred years a canon of knowledge concerning modern-day travel has appeared: terminology, research methods, concepts, paradigms, etc. Experience and assistance offered by tourism researchers has allowed representatives from other academic fields to avoid ignorance and naivety in the treatment of this phenomenon [see: P. Pearce – appendix; cf. Winiarski, Alejziak, 2003].

Academic institutions are influenced by ideologies, both in the very process of teaching and formation of knowledge, and in their connections with the outside world – this includes the necessity of meeting the demands of the market and businesses. As Burnett states, "Ideology has gained such a grip in universities that it is no longer clear that the idea of the university – as pointing to a site of reason – can be realized" [2003, pp. 1-2; quoted in: Tribe, 2006]. Certainly this is only one of the basic fears expressed by experts. Steering tourism academies toward educating their staff to suit the needs of the business side of tourism influences the content of educational programs. This also leads to the dominance of applied, quantitative research projects in which tourism is often analyzed in a limited manner, deprived of any solid theoretical foundation.

Conclusion

At the heart of being a mentor is the relationship with his/her students. Many characteristics of this relationship have remained the same since universities were first established, emphasizing the ethos of students striving for truth, upholding ethical principles, and devoting themselves to noble ideas. An outstanding researcher fulfills many different roles such as leader, organizer, counselor, chief, and adviser. This is a person characterized by vast knowledge, who values honesty and correct research methods, and who carefully observes reality and critically comments on it. Such a researcher also establishes the conditions according to which academic schools are created [see: Liszewski – appendix]. Undoubtedly, the respect that a researcher gains is not solely connected to his/her age

or academic position. The grounds for recognition are, first and foremost, research ideas and level of engagement, quality of written work, and also aspects of a researcher's personality which contribute to his/her charisma or personal charm, which, to no less a degree than experience, can lead young students to desire to collaborate with a well-respected professor. This type of figure inspires others in their work by spreading passion and enthusiasm. A mentor's work does take place, however, in an educational institution, which can sometimes have the same dysfunctions as other spheres of social life.

Awareness of the conditions involved in the construction and transmittal of knowledge reveals academia to be a system which came into being in a historically, culturally and politically specific reality. Are we capable of anticipating the further transformations of the academic community in response to the challenges of the 21st century, while keeping in mind the role of outstanding researchers? What is the status, in this respect, of this relatively new branch of knowledge – tourism studies? The various dimensions of a scholar's role in modern-day academia have been described in studies dedicated to university education [see: Bagrowicz, 2008; Gadamer, 2008; Goćkowski, Woźniak, 2003; Heller, 2009; Melosik, 2009; Reading, 2002; Sławek, 2002; Ziemiński, 2009]. The very essence of a university has constantly been in a process of evolution, and still continues to evolve today. The character and directions of current developments have given rise to a whole range of questions concerning the form in which universities will continue to exist in the new reality of our globalizing world.

In Poland, since tourism and tourism theory have been able to develop dynamically only since the political transformation in 1989, it is necessary to pay attention not only to the dilemmas that are typical in academia in the 21st century, but also to those that are unique to the post-Communist countries of Central Europe. Among the tendencies singled out by Polish experts, one can find unfavorable (and mutually determining) phenomena such as the decreasing quality of publications, a lack of resources for funding research, and barriers in international collaboration [see: Gołembski, Winiarski – appendix]. However, pessimism concerning the future progress of tourism studies has also been expressed by foreign academics [see: Kozak – appendix]. The current situation undoubtedly demands improvement and continuous monitoring, solidarity between researchers [Belhassen, Caton, 2009], condemnation of unreliable and unethical practices, and the awarding of inspirational people and model initiatives. The role of mentors in this case, both now and in the future, cannot be overestimated.

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WHO IS AN ACADEMIC MENTOR, AND WHAT IS HIS/HER ROLE IN CONTEMPORARY STUDY? SOME THOUGHTS BASED ON TOURISM RESEARCH

*Wiesław Alejziak**

Abstract: This article concerns the roles played and tasks set before the outstanding researchers and scholars who we are here calling academic mentors.[1] The basis of these analyses will involve a study of the literature and a special opinion survey on the subject, conducted amid leading tourism researchers from Poland and abroad. Quite outside of considerations concerning academic study in general, the function mentors serve in an academic community was primarily approached in terms of tourism research, which – in the author's opinion – is at quite a special point of development. Like many other young fields of study, tourism is still in search of its place in the "pantheon of sciences," and its further development (which includes its future autonomy) remains much in question. This article outlines the basic characteristics and classifications of the notion of academic authority, its variants, and sources. The basic factors that make up the scholar's ethos have been identified, as have certain measures of the mentor in academics. A typology has also been established, singling out three basic types of academic mentors ("Coryphaeus/guide," "interpreter/defender of the canon" and "scholar/educator"). Based on analyses of circumstances and various aspects of academic activity, an attempt was made to identify the paths (i.e. the factors and activities) leading to academic mentorship, and those paths that lead away from it. Apart from studies of the literature and participatory observations of academic life, the conclusions presented here are based on the opinions of thirteen outstanding professors from nine countries and four continents, thus representing various models and structures of contemporary academia, and various disciplines involved in researching tourism. Their opinions have been included as a special attachment to this article.

Key words: academic authority, scholarly ethos, measure of authority, types and attributes of academic mentors, functions and tasks of academic mentors, tourism research, tourism study, academic career, stimulating factors, and academic development barriers.

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[1] In Polish the term *mistrz naukowy* is frequently used and provides a good reflection of the role and significance of this kind of scholar in academia, as well as the essence of the problem tackled in this article. Unfortunately, the English word "master" has an entirely different meaning, and is seldom used with regard to academia, which – owing to the bilingual nature of this special issue of *Folia Turistica* – has presented a problem of sorts. We have chosen the word "mentor" among several similar terms (eminent scholar, expert, authority) as the most apt.

Introduction

Tourism is a subject of interest for academics in many disciplines, which means that research into this phenomenon is marked by a remarkable diversity of issues, approaches to research, methodology etc. [cf.: Alejziak, 2008; Alejziak and Winiarski, 2005; Gołembski, 2003; Jafari and Aaser 1988; Dann, Nash and Pearce, 1988; Tribe, 2006; Przecławski, 1993; Winiarski, 2003 and 2004;]. Over the past dozen or so years, tourism research has made great strides; this does not mean, however, that this progress is satisfactory. On the contrary, the output that has come from tourism studies remains relatively limited in comparison with other fields of study. In our attempts to evaluate the present state and the prospects for further development of tourism research, we are dealing with a situation fairly rare in academia. On the one hand, its development is dynamic, which confirms that we are presently in a phase of tourism's "scientification" [Jafari, 2001; Xiao and Smith, 2004]; on the other, the achievements emerging from research to date are quite critically evaluated. Adherents of the former position indicate not only the ever-growing number of academic publications, but also other phenomena testifying to the role of the discipline, such as the ever-growing number of academic centers, research programs, conferences and symposia, and above all, the swelling ranks of academics conducting tourism research, who represent not only disciplines traditionally interested in tourism issues (such as geography, economics, or sociology), but also entirely new fields of study. Discussions on the evaluation and development of this research – quite apart from the difficulties encountered in creating new theories – indicate attempts to modify the research concepts and approaches to date [cf.: Franklin and Crang, 2001; Rojek and Urry, 1997]. Meanwhile, critics stress that progress in tourism research is quantitative, not qualitative [cf. Cole, Hall and Duval, 2005; Riley and Love, 2000; Walle, 1997]. The aim of this article is not, however, to reconcile these contradicting opinions and conflicts, but to consider the role of mentors in the field of tourism research, and what their impact has been, and currently is on the state of tourism research and its paths of development.

The Ethos of the Scholar and Mentors in Tourism Research in Light of the Literature

Discussions on the ethos of the scholar are the subject of consideration of many academic articles. In Poland the subject has been raised no less often than in other countries.[2] However, the majority of these publications concern issues of a general nature and the traditionally perceived "mentor/ student" relationship with regard to study on the whole, and is more historical in nature.[3] There are significantly fewer publications dealing with the greater role of academic mentors, taking into consideration the changes occurring in contemporary academia. This particularly concerns "new" academic disciplines and fields of knowledge, such as tourism. Meanwhile, it is precisely in these studies that this discussion seems most vital. There are few works in tourism literature where this article's central issue – the role of mentors in the development of tourism research – is addressed in a complex fashion, and is based on empirical research. Only in recent times have two interesting books and several interesting articles appeared on the subject, in which the impact of major researchers on the development of tourism studies has been analyzed from various angles and to various degrees (both in reference to the pioneers who created the framework of tourism theory, and the present leaders who decide upon the streams of tourism research development).

One important source of information on this subject is a book edited by I. Ateljevic, C. Harris and N. Morgan: *The Critical Turn in Tourism Studies: Innovative Research Methods* [2007], including articles by nine outstanding tourism researchers, who, in the chapter entitled "Processes of Becoming: Academic Journeys, Moments and Reflection," not only evaluate the state of tourism research, but also indicate the turning point at which tourism studies presently finds itself. The work includes many fascinating perspectives on the leading researchers and scholars who have marked the path for the development of tourism theory and research. Another book edited by D. Nash is similar: *The Study of Tourism: Anthropological and Sociological Beginnings* [2007]. This, in turn, includes thirteen autoethnographies

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[2] Apart from the bibliography of this article, the basic publications in this field – both in Poland and abroad – include works by foremost tourism researchers presented in a special appendix to this work.

[3] One example of such work is the outstanding (over 700-page) book by L. Witkowski, entitled *A History of Authorities in Culture and Education* [Witkowski, 2011], which – apart from analyses of various positions and views on the role of authority in culture and education – also contains many examples of the significance of authorities, based on the life stories of great world figures from the worlds of culture and education, from ancient times to the present day.

written by celebrated tourism researchers of the older generation. These true mentors and Nestors of tourism research took observations from the "tourist world of academia" and personal experience and presented their opinions on how the canons of tourism knowledge came to be, and what role they themselves or other pioneers of the discipline played in making them (particularly in the fields of sociology and cultural anthropology). Interesting information and causes for reflection on the subjects analyzed in this article are supplied by an autobiographical book written by some scholars [Botterill, 2003; Hall, 2004; Przecławski, 1999, 2005], as well as by books and monographs published for various anniversaries and jubilees of outstanding tourism researchers.[4] To some degree, this issue is also addressed by the article written by P. Perce included in this issue of *Folia Turistica*, concerning the development of tourism research in Australia.

And yet, the work that addresses the issue indicated in the title of this article most thoroughly is J. Tribe's "Tribes, Territories and Networks in the Tourism Academy," which appeared in the prestigious *Annals of Tourism Research* in 2010 [Tribe, 2010]. It is a summary of sorts of the solutions contained in the above-mentioned publications, adding more themes and increasing the range of positions they present, through making the research more representative. The writer provides the results of research on "tribes, territories, and networks in the academic tourism community," citing encoded responses collected in his own research, and opinions drawn from the above-mentioned works, and a few other publications. Altogether, the research was based on 16 in-depth interviews (lasting 60-90 minutes), 22 e-mail surveys, and information contained in 29 scholars' biographies and autobiographies. All the gathered information was analyzed using the actor-network theory, as presented by T. Bercher and P. Towler in *Academic Tribes and Territories* [2001]. In sum, the opinions of 67 tourism researchers were analyzed, representing various fields of study and hailing from different parts of the world. Nearly half of them (36 people) the author defined as "Senior: Key position." The text of the article demonstrates that, to a large extent, they could correspond to the scholars (or "mentors of tourism research") who are the basic subject of the present work, while the author of the article explains that they are tourism researchers: "academic seniority was defined as being a professor, department head, or holding a position of high peer esteem" [Ibid., p. 8].

Tribe's article provides a great deal of information on how the "field" and not the "discipline" (a distinction he clearly emphasizes) of tourism research was born. Indicating the difficulties this process encountered and

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[4] For instance, in Poland special books and monographs like this have been devoted to R. Peretiatkowicz [Nowakowska, 1998], R. Gałecki [Gołembski, 1999], S. Liszewski [Włodarczyk, 2011], and A. Matuszyk [Cybula, Czyż, Owsianowska 2011], among others.

the problems presently in tourism research, Tribe stresses the role that a relatively small group of outstanding tourism researchers have played, both before and today; these he calls the "primary actors" [Tribe 2010, p. 25]. The author begins with the assumption that "The canon of knowledge is heavily contingent on the power of those who speak for tourism, their spatial and temporal situatedness and the social practices that sustain their position and authority" [Tribe, 2010, p. 15]. One of the basic theses of this work is that "the pioneers who established the field are retiring, gradually superseded by a new generation of scholars, so the field is at a crossroads in its development and therefore ripe for critical review" [Tribe, 2010, p. 7].

Regardless of the many critical opinions on the movements in and present state of tourism research to date, both Tribe and the scholars he quotes stress the major role that a quite easily designated (owing to their small number) group of researchers have played in the development of tourism research; people whom one respondent calls the "guardian angels of tourism" [Tribe, 2010, p. 20].[5] Their significance would be hard to overestimate in today's world, in this era of rapid change in science, and in the face of certain concerns with regard to the new guard of tourism researchers expressed by some advisory groups of academics and in some related publications. As a younger researcher phrased it in Tribe's work: "we're just enjoying the buzz of being the second generation of tourism scholars" [Tribe, 2010, p. 26]. It would seem this should be accompanied by not only respect for and knowledge of mentors' work and wisdom, but also an attempt at least to equal them in academic mastery, something which, in the opinion of some scholars of the older generation, does not always take place [cf. R. Butler, E. Cohen, G. Dann, and M. Kozak – see appendix]. These problems are splendidly outlined by P. Pearce, when in he writes about "Generation T" being created by the new tourism researchers educated purely in tourism studies, and about the weakening ties between the younger generation of researchers and the traditional disciplines [Pearce, 2005].[6] It would seem that the role of the present mentors in the further development of tourism research was accurately defined by M. Kozak, who calls them "masters of the present day, but also the potential tomorrow" [see: appendix].

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[5] Among the three people mentioned in this group, two (E. Cohen and R.W. Butler) are "our mentors," i.e. authors invited to take part in this special edition of *Folia Turistica: The Master Classes*. To my mind, at least a few other participants in this project deserve to be mentioned alongside them.

[6] On the difficulties in developing tourism research see works by H. L. Theuns and G. Dann, who call attention to the fact that they have found themselves at a theoretical impasse of sorts [see: appendix]; for a wider take on the problem of the erosion of the scholar's ethos and the decline in academic prestige, see the works by E. Cohen, Gołembski and R. Winiarski [see: appendix].

These few above-mentioned works are among a small group of publications which, to some degree, address the role that outstanding tourism researchers have played in developing this field of study. As such, we have decided to broaden the scope of analysis and go beyond pure research, considering such added issues as care for the development of the younger generation of academics, academic ethics etc. In other words, we have decided to take a wide-angle view of the role of mentors in modern academia, using tourism as an example. To this end, we have invited a group of exceptional tourism researchers (on a world scale) to present their views on the subject. We have collected opinions from 13 professors (eight from abroad and five from Poland) representing various fields of tourism research. A special list requested that they submit (by e-mail) written responses to a few key questions, concerning the ethos of the scholar and his/her role in academia, taking into account changes that have recently occurred, possible modifications in perceptions of the functions and tasks of today's "academic mentors," their work to improve research quality and tourism publications, to improve methodology, new directions in research, the development of teaching staffs (particularly young tourism researchers), the (international and local) integration of the whole tourism research community, academic ethics etc. The opinions thus gathered made a splendid complement to the author's study of the literature, and are included unaltered in the special appendix found at the end of this article.

Who Is an Academic Mentor?

Is there a "recipe" for becoming a mentor in an academic discipline? Of course, there is no one method, nor a universal "prescription" for achieving success in academia.[7] Even less is there an effective recipe for how to deserve to be called an academic mentor, or to be perceived as such in the academic community. An analysis of the lives and careers of outstanding academics and the paths they took to arrive at their positions (e.g. in the educational sense, the schools from which they graduated) indicates that there is no way to teach a young researcher to be a mentor. Moreover, there are not even general principles for how to become an "ordinary" scholar. Otherwise, we would surely have schools and colleges to prepare future scholars, and perhaps even mentors. These exist nowhere in the world (happily, no one has thought of inventing them yet). This surely

[7] In his article, A. Woodside does provide a certain universal and very wise "prescription" for the academic mentor [see: appendix], though not in the same sense as we have in mind here.

comes from the fact that teaching is not an ordinary profession. This is one reason why people who desire to take it up – all the more so if their ambition is to become an academic mentor in the future – should never perceive teaching in this way (i.e. as one profession among many others). Teaching is something utterly different – something that is, in a sense, closer to making art, and literature in particular, than a real profession. Of course, there are fundamental differences between literary work and academic research and writing.[8] The most important among them is perhaps the very essence of the issue addressed in this work: the continuity of academic development and the role played in this discipline by the great forefathers. The literary artist, like the scholar, grows and is educated on the works of his predecessors, who are often models of sorts for him, whom he would like to emulate, to partly equal the achievements of the mentors in their fields.

We need not describe what relationship the beginning writer may have to such writers as Shakespeare, Dostoyevsky, Mann, and Eco, or how the young scholar perceives Copernicus, Darwin, or Einstein. Despite many similarities, there is, however, a basic difference between the way literary artists and apprehend their precursors. While the former appreciate the work of the masters of the art both past and present, their own work can entirely depart from it (this is even advisable, and sometimes even necessary) and they can work apart, as it were, from the accomplishments of their precursors. Even if the artist or writer does not know the masters of their genre, they can create valuable, original, unique pieces, which can become masterpieces of their genre and, in the future, join the canon of the discipline. Not so for the academic/researcher, who must necessarily know the work of "the great ones" in his field; without the knowledge created by the generations before him, he would be unable to understand the essence and nature of the things, processes, and phenomena he researches. He must, therefore, know everything that has come before him in his field, be able to critically assess it, in order to creatively develop it, to perfect it. In academia, after all, the verification of erroneous theories and new discoveries are often only possible after

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[8] This was brilliantly described by S. Ossowski in his *O osobliwościach nauk społecznych* [Peculiarities of the Social Sciences, Ossowski 1983, pp. 214-244], which indicates the major similarities and differences in the two kinds of works. We should add that – while stressing the differences – Ossowski also perceives the significance that literary work has for knowledge (particularly in the social sciences and the humanities). To his mind, it is hard to overestimate the role that Thomas Mann's *Magic Mountain* has had in increasing our knowledge of man; for many readers it has surely had equal value to many academic works. Another example might be Shakespeare's *Hamlet*, which is a great field for psychoanalysis, or equally so, Shakespeare's *Julius Caesar*, which tells us a great deal about mass psychology.

some time, along with new capabilities created by scientific progress, technology, or knowledge as such. Without this, we cannot speak of academic progress, and by the same token, of mentorship in academia.

It would seem that a discussion on the role of mentors in modern academia should begin with a question: Who is a scholar, and how is it that only a few scholars become true academic mentors, while the rest remain students all their lives? This does not mean, of course, that they might not be splendid scholars. Academia gives us ample proof that this is the case.[9]

Answering the above questions is no easy matter, and discussions on the subject are held in various academic fields. The notion of the academic mentor is often identified with terms such as authority, expert, and even university professor.[10] Perhaps the greatest number of publications concern the notion of the academic authority. It is most often accepted that the basis of academic authority is high competence and significant achievement in a certain field, which should be accompanied by the convictions of people who recognize the authority of a given scholar – that s/he has intellectual integrity and high standards of moral behavior. According to J. Goćkowski, who wrote the "academic authority" entry in the brilliant compendium *Filozofia a nauka. Zarys encyklopedyczny* [Philosophy and Science: An Encyclopedic Outline, 1987], there are essential differences in the perception of authorities, depending on the type of study, but academia could not function without authorities. In his view, humanistic studies differ from the natural sciences, empirical from formal, theoretical from practical, nomothetic from idiographic, explicative from normative etc., as expressed in the qualities of the authorities in each kind of study listed above. We might generally accept that "we are dealing with an academic authority when a certain circle of academics recognize the expertise of a scholar in his/her professional practice, as a highly competent creator of cognitive value, as a mentor and teacher of academic thought and action" [Goćkowski, 1987, p. 41].

To become an academic authority, one need be acknowledged by two kinds of circles which create such authorities [ibid., p. 44]:

▪ the elective circle – including people for whom academic authority is the personification of the model scholar, i.e. someone more perfect than the

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[9] Not every great researcher and scholar is perceived as a true mentor in his/her field. History is full of examples of great academics who, for a variety of reasons, did not deserve to be called academic mentors.

[10] In some countries (e.g. Poland) professors of colleges – and thus often academic mentors – are formally called academic instructors. This would seem to deprecate their position, as a professor's duty is less to teach (this is what teachers should do) than to shape the listeners, to shape their intellect, creatively inspire them etc. There is a basic difference between the concepts of teaching and educating (if only in the tasks they have to fulfill), though this difference seems to have been forgotten as of late.

general academic worker; this circle is made of novitiates for whom an authority is an oracle of sorts, a road sign, and a mentor to intellectually and morally inspire them;

▪ the promotion circle – including people who are already academic authorities, for whom new people in the group are of vital significance, for they enrich and strengthen it, and ensure the circle's continued existence.

The two circles mutually complement one another, though their role and significance are not the same. The role of the "elective circle" is in that it gives authority significance, as authority can only be *for* someone. Being a model and mentor to oneself is meaningless [Winiarski – see appendix]. The role of the "promotion circle," on the other hand, is to confirm the status of the new authority and recognize it as a new luminary in a given field, through the academic competencies of people who – owing to their achievements – already hold such status. In the "promotion circle," i.e. the community of academic authorities, there is a kind of informal (and sometimes formal) hierarchy, indicating that one might speak of a certain gradation of academic authority. Whether someone has great or merely substantial academic authority, and who might be the greatest authority in a given field, is decided by factors such as [Goćkowski, 1987, p. 44]:

▪ the degree to which the authority sets the yardstick, measured by the power of his impact on the academic thought and activities of those who regard him as an authority;

▪ the scope of the authority's influence, which can be measured geographically (national, international, world) and in a disciplinary sense – if someone holds authority in only one academic discipline, or in a greater number of fields;

▪ the scope of the authority's influence, as related to various kinds of academic activity and various spheres of values and principles, in which the opinions of the authority affect the academic community;

▪ the length of the authority's influence, relating to the time in which a given scholar enjoys authority (e.g. the number of generations of researchers influenced by his academic work).

Does every academic authority deserve to be called an academic mentor? The fact that a true academic mentor (in the sense adopted in the present article) must also be an academic authority is beyond discussion. Is being an academic authority, meanwhile, equivalent to filling the role of the mentor, with "being a mentor in the sphere of academia"? It would seem that authority alone is insufficient. A vital condition for becoming a mentor is being engaged, and a mastery that manifests itself in both the educating process and in the shaping of future mentors. This concerns, in particular,

the ability to "fish out" real talents among students and young co-workers, those who will continue the work of the mentors, enriching it in the future. Thus the concern for the development of the young academic staff, and in particular the most clever researchers; this can be rated one of the central attributes and tasks of the mentor. This was beautifully put by A. Matuszyk, when he wrote that the essence of "being a mentor" is the ability to make others great [Matuszyk – see: appendix].

According to K. Przecławski, "…the summit of every professor's dream should be, perhaps, to become a mentor. The mentor is an intellectual guide, and sometimes also a spiritual guide, a wise man, or a prophet" [see: appendix]. It would be hard to disagree, as there are many analogies between the academic mentor and the religious mentor; the various typologies describing one and the other testify to this [see: G. van der Leew 1997, pp. 568-580; Wach, 1961, pp. 311-360]. All this taken into account, we can perhaps accept that, while an academic authority can be spoken of in gradations, for academic mentors no such thing exists. **One either is an academic mentor, or is not.**

Analyzing the relevant literature and the lives of leading academic scholars, we might indicate a few basic attributes that potential academic mentors should have. The most important include:

1. a rich and valued list of academic achievements, measured by the quantity and quality of publications that are well-known and respected by the scholarly community (at least in the field in question, though many mentors are recognized by a wider group of scholars, and by people outside of the academic community);
2. serious accomplishments in building theories, perfecting research methods, and in other aspects of the canon of knowledge in a discipline;
3. participating in marking out new directions in research and innovation in academic thought and work as such;
4. capability in organizing academic activity and leading a team of co-workers, including a familiarity with and respect for their interests and research preferences, manifesting itself in ensuring their needs are met – both those of the team as a whole, and of its members;
5. wide-ranging academic contacts, including those abroad, which allow for joint research projects, foreign academic apprenticeships, guest lectures, participation in conferences and academic symposia etc.;
6. a mastery in forming a teaching staff and collaborating with younger academic workers, both from an academic and a moral point of view;
7. an uncompromising relationship to the basic principles of academic ethics and the scholarly ethos, manifesting itself in the ability to defend them even in the face of personal loss, should the necessity arise.

We could undoubtedly indicate other attributes of the academic mentor, but those mentioned above have, perhaps, the greatest significance. It seems that the true mentor should hold all of these attributes, though they will not, of course, reveal themselves to the same degree in every field of his/her mastery. We might say that an academic mentor *sensu stricte*, and thus chiefly with regards to academic/research work, is someone who has the first four of these attributes. In turn, if a scholar is chiefly has the last two qualities, and to a lesser degree the first four mentioned, we then have more of an authority in academic life. The fifth point, extensive academic contacts (particularly abroad) or what we today call the internationalization (and perhaps even globalization) of academia in its broadest definition, are all-important at a time when international collaboration and the mobility of academics are qualities which every contemporary academic mentor should possess.

Analyses of academic life in its broadest definition, conducted with consideration for the specifics of various academics fields and disciplines, indicate that a mentor is perceived somewhat differently in studies with long traditions (such as philosophy and mathematics) than in new studies (particularly those just emerging) which need to create their mentors swiftly to mark out future paths in their fields. In this context we ought to mention the role of a field in perceiving mentors and the functions they are meant to serve in "academic revolutions." The violent changes in the canons of various fields of study, modifying the paradigms revolutions carry along with them, naturally overthrow old authorities and bring forth new mentors. This is standard practice in academic life, where, on the one hand, we have continuity, and on the other, unending change. These (e.g. continuity and change) to more or less the same degree concern most of the more important components of academia, from values and norms of scholarly proceedings, to methods, research techniques, scientific laws and theories, and the functions, structures, and institutions of the system of knowledge. Though every new generation of scholars has its academic authorities, there remains a strong tie between authority and tradition in academia. This is why we often see the "legacy of academic masters" process at work. This particularly concerns social studies and the humanities (e.g. philosophy, sociology), but the significance of this process also becomes visible in those studies where clear paradigms have yet to be shaped (such as tourism studies, for instance), where the mentors stand on guard, as it were, for the foundations of the discipline's thought and activities.

Academic mentors form the elite in the academic environment. With their positions, running study/research units and taking charge of technical and financial resources, and also with their contacts with decision-makers and centers of power, they have a particular impact on the paths and scope

of academic research. The academic careers of younger staff also to a large extent depends on these mentors, as the former need to climb the rungs of the profession. Holding decision-making panels of various sorts, such as the department councils that award degrees and academic titles, or the editorial committees of magazines and publishing houses – and moreover, directing them – the mentors to a considerable extent decide on development and positions, both in terms of the whole staff unit, and of individual researchers. Actively taking part in international academic life, through participation in conferences, trips to work abroad, guests lectures etc., they can extend both their own views and achievements and those of their co-workers. Many mentors called attention to the significance of international collaboration and to the fact that academic mentors (particularly in tourism) should have extensive international contacts in the statements they submitted for this article [see: appendix]. This is tied to mentors' readiness to take long journeys, sometimes abroad. Their significance – though in somewhat different contexts – were particularly emphasized by P. Pearce and R. Winiarski [see: appendix]. G. Dann, in turn, stressed an issue which clearly connects with journeys and international collaboration: the multicultural phenomenon of tourism, which should also be reflected in tourism research [see: appendix].

Types of Academic Mentors

As with other kinds of human activity (e.g. types of tourists with reference to tourism activity), we can also discriminate between academic mentors. One of the most oft-quoted is the division between "great predecessors," "founding fathers," and "luminaries and mentors of the present" [Goćkowski, 1987, pp. 43-44]. In the professional tourism literature there probably are no concrete, scientific or research-based typologies of academic mentors in tourism. I seems, however, that based on various authority typologies in the fields of science, art, or religion, we can outline three basic types of mentors in this field:

- The "**Coryphaeus/guide**" academic mentor. Coryphaeus (Gr. *κορυφαῖος*, *korypháios*) was a master of ceremonies, a guide upon whom greatly depended the success of a play in the Ancient Greek theater. He announced the most difficult issues and conducted the choir. An academic mentor of this sort is a kind of guide in the world of theory and research in a field. He is a scholar of not only the highest academic abilities, but who also sees his work in terms of a mission, to which he devotes himself entirely, longing to overcome obstacles, make breakthroughs, and create entirely new research methods and theories to open new possibilities for study.

It is an academic mentor who has the greatest significance for his discipline or field of study, without whom progress is hard to imagine. This is a true academic luminary, who has not only brilliantly learned the canons of his field and is able to guide other researchers (particularly young ones) through the epistemological/methodological meanderings of the discipline, but who also adopts the role of the scholar marking out new directions, and often new horizons of research in a given field. Mentors of this sort often hold the status of "founding fathers" of various fields of study, or of the creators of the basic doctrines that go to create them.

- The **"interpreter/defender of the canon"** type of mentor is a scholar for whom the purity of the canon in a field is most important, alongside concern for the fact that it is only joined by researchers of the highest standard (both in a theoretical-methodological sense, and in a formal-bureaucratic one), defined by the structures administrating and managing academia and the academic community in the given field. Owing to his outstanding authority in a research community, such a scholar is an arbiter of sorts in matters concerning a given field. His opinions (or "rulings") generally hold sway in the thought and academic work of other researchers. It is his opinion, to a large extent, which decides if a theory, law, research method etc. will enter the canon of knowledge in a given field, or what will be discarded at a certain moment (though this does not mean forever). Being a "defender of the canon" is a difficult and often thankless task, as it opens him to attack from other researchers. These can be scholars whose concepts he has rejected, or visionaries and creators of revolutionary concepts whose views and research go beyond the canons and horizons of a given field and time. In this last case, it often unfortunately happens that the "interpreter/defender" is mistaken, which must be a cause of frustration and pangs of conscience, as he has not appreciated the importance of a given discovery or theory, or the possibilities they create etc. Even if a given "defender of the canon" does sometimes err in evaluating a discovery, we can be sure that this type of mentor is essential. For like any human activity, study is not free of error. But if someone who plays the role of judge in matters that are fundamentally important for academia – often not by his own choice, but because of the authority he enjoys in his community – and is guided by "the good of the discipline" in his work, these errors (which, *nota bene*, are few compared to the number of matters solved) are forgiven by the academic community. The community trusts such mentors, believing that they protect it from distortions and mistakes, as they are well versed in the doctrines of their field. One of the basic tasks of this kind

of mentor is to prevent "weeds from growing" in the soil of academia in the form of false theories, or people from entering "the hallowed halls of academia" by the side-doors, by betraying the rules and principles of academic work, for instance.

- The **"scholar/educator"** academic mentor is a scholar of outstanding intellectual, academic, and moral virtues, who attends to the development of the younger academics, and particularly his own students, in a special fashion – in a way both direct and "everyday." He explains to them a scholar's basic roles, and shows these to them in practice. He skillfully shows them all the twists and turns, and above all the beauty and attraction of academic work and life. His basic ambition is to leave behind successors to continue "his work," creatively unfolding it. He longs to pass his knowledge and experience on to as many students as possible – which does not mean it is easy to become a student of such a mentor. The scholar/educator type of mentor has, after all, remarkable skill in evaluating the potential of future scholars. He can perceive what lies hidden in them, he notices abilities and qualifications in his future students as they are just emerging. With this in mind, he allows young researchers to unfold their academic passions and takes care to equip them as far as possible with the attributes needed for academic work. This is why direct contact with the student, shared discussions, research, and participation in the work being developed are of the essence for mentors of this sort. This type of mentor places particular focus upon academic ethics and morality, which he treats as sacred, and as the core of the scholar's and professor's ethos. In his case, authority is least based on research achievements and writings (though these remain very significant), and more upon his moral virtues and his approach to study. It would seem that this sort of mentor exerts perhaps the most influence on the processes by which the intellect is created and the shaping of upright moral postures among future scholars. Young academics should learn the right approach to scholarship from these mentors, drawing from their wisdom, modeling themselves upon them, though without neglecting their own potential along the way, as the true goal of scholar/educator mentors is to allow (at least some of) their students to achieve more than they have themselves.

Apart from the above-named types we can, most certainly, isolate many other categories of academic mentors, who can be distinguished on the basis of various criteria, such as: the weight and significance of their academic work, the value of the works created by the mentor's students, the innovation of the discoveries and theories developed, depending on whether we are

speaking of mentors with whom other researchers have direct contact, or if they are only known from literature, if they are still active or not, if they are still alive, or we are dealing with mentors now deceased[11] etc.).

It sometimes occurs that more than one true mentor appears at a given academic center (a department, institute, or in exceptional cases, in a single chair). Such places then flourish (assuming that the mentors cooperate, or at least constructively compete, instead of struggling with each other, which can also occur – we will return to this point later in the article). Such a situation can lead to the establishment of a **"collective academic mentor" in the form of a "school,"** such as the Lwów Mathematics School, which was created by a group of Polish mathematicians in Lwów [presently Lviv, Ukraine – trans.] working at its colleges, led by Stefan Banach. S. Liszewski [1997, 2009] has written on the significance of schools of thought in the geographical studies (taking into account tourism issues); he also returns to how they function in the text submitted for this article, indicating the Łódź school of the geography of tourism, dealing with "tourist space" [see: appendix].

Schools of thought generally have their mentors, who not only play major roles in their coming to be, but also in their further development. They may even constitute a separate (sub-)type of the mentor, which we might call the **"leader/director,"** though it would seem that this type of mentor is more frequently among those continuing the work of the school's founders than among the founders themselves. We can certainly speak of a mentor of this type with regard to other academic circles (academic societies and their various sections, commissions, and committees, interdisciplinary research groups, the councils and editorial staffs of professional magazines, department councils, commissions etc.). D.G. Pearce, among others, writes of the role of leadership in tourism research, particularly in the development of young teaching staffs, stating that this is one of the basic functions of the mentor [see: appendix].

Academia has also seen cases of **"tandem mentors,"** outstanding researchers who – for longer or shorter periods – have done research or written as a pair. Examples of such tandems might be two Swiss economics professors: Walter Hunziker and Kurt Krapf, who are generally considered among the "founding fathers of tourism studies." They conducted tourism research for many years as a pair, and their joint book, *Grundriß Der Allgemeinen Fremdenverkehrslehre* (A General Outline of Tourism Studies) [Hunziker, Krapf, 1942], is acknowledged as the first work to put tourism research on an academic pedestal.

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[11] Beautiful examples of stressing the significance of past mentors are the two special memoir articles devoted to the life and work of a great researcher and master of tourism theory, Professor S. Medlik, written by D. Aires, and published in the prestigious *Tourism Management* [Airey, 2007] and *International Journal of Hospitality Management* [Airey, 2008].

The Functions and Tasks of Academic Mentors

Of the characteristic attributes presented thus far and the types of academic mentors, we can determine the basic functions they serve in contemporary academia.[12] These can be established on the basis of mentors' various activities. According to J. Goćkowski, we can distinguish between three various functions of academic authorities: tie-forging, study-creating, and educational [Goćkowski, 1987, p. 45]. These are all, of course, connected, combining to make a more widely conceived function of culture-creating studies. With a certain analogy to this division, and in relation to the tasks that academic mentors should fulfil in our day, we might say that the most important functions concern three spheres of academic activity: research/theory, educational, and organizational-integrative.

The first case (**the research/theory sphere**) concerns the mentors' purely research activities and their achievements in expanding their academic oeuvre, in creating works of great value for their field, which become a permanent part of the canon of knowledge. For this to happen, the mentor must have broad knowledge, a fine control of research methods, and an academic intuition of sorts, which is essential in finding interesting research topics and new concepts, and ways of solving them. Analyzing the functions of academic mentors in the **educational sphere,** in turn, we are chiefly dealing with their input into the development of young teaching staffs, and their shaping of the correct approach to the scholar's rules and duties. It is how mentors handle this role that to a large extent decides upon the future of academia, on the progress that must go hand-in-hand with it, as it is not the present mentors, but their students who will have the greatest impact on its development.

The third of the above-named functions of the mentor is no less vital, as it concerns matters of **organizing research and integrating academic activity**. As people who generally head their chairs, departments, institutes and so forth, mentors have to ensure they optimally function in a technical (buildings equipped for teaching), personnel (the right choice of employees and the guidance of their work) and financial sense (research funds) [R. Butler is among those who addresses this – see: appendix]. Taking into account the above-mentioned noble aims that mentors want to and should achieve, as well as their exceptional role in the whole of the academic mechanism, these affairs may seem trivial.

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[12] P. Pearce, among others, calls attention to the fact that mentors serve many different functions (see: appendix). S. Liszewski also lists the many functions of mentors, writing of the mentor as a leader, initiator, organizer, educator, research promoter etc. [see: appendix].

Nonetheless, any failures in these areas of the mentors' activities can have significant effects, not only for how the individuals he directs function, but also (from a wider perspective) for the functions they are to fulfil in academia. In the context of this sphere of activities we need to consider the integration of academic activities, in its widest definition, which for tourism research is of particular significance, owing to the fact that tourism is only now seeking out its paradigms, and is setting out on the road for autonomy. It is assumed that this might take the form of [Alejziak and Winiarski, 2003, pp. 162-165]:

- *theoretical integration*, whose basic aim should be the systematization and synthesis of tourism knowledge. The perfecting of tourism terminology and classification, and the typology of various tourism phenomena should serve this end; without these, we can scarcely speak of comparing research results and accumulating a body of theory;
- *methodological integration*, which should be seen in the adoption of shared premises concerning research methods and nearing tourism studies to acquiring its own "integrative methodology," i.e. to a situation where representatives of various disciplines will participate in the same research without greater problems, to their mutual benefit;
- *practical integration*, which, on the one hand, should aim to create the optimal technical, organizational, and financial conditions for academic development and teaching in a certain field, and on the other, the collaboration between study and practice in solving problems in the tourist industry [the texts by G. Gołembski and H.L. Theuns deal with this issue – see: appendix].

It would seem it is hard to overestimate the role of mentors in each of the listed forms of activity to integrate tourism studies. An academic mentor in this field should also serve as an agent for the interests of tourism and its community in "external contacts," in the wider forum of the academic society. On every occasion s/he should indicate the significance and usefulness of tourism research and the necessity to secure funds to improve the standard further still, and deepen the knowledge in this field. The mentors invited to express their opinions on this subject also called attention to such functions in tourism (i.e. their task to emphasize the significance of tourism research and to build a good position for the academic community in this field). P. Pearce suggests that mentors should be "warriors for tourism," introducing tourism to the academic discourse, while R. Winiarski states that an attribute of being a mentor is conviction of the significance and value of one's work, even if its aim (tourism) is still seen as an "exotic" field of research [see: appendix].

The Paths Which Lead to Being a Mentor in Academia

In the classic concept of the status of the scholar achieved through "studying with a mentor," which included such elements as: direct contact, observing him during work, emulation, using his advice, and academic technique, both in a methodological sense and a technical one. Ultimately, however, every future scholar has to learn to do original research for himself. He should however, take advantage of the advice and examples given him by his mentor, and of the chance to emulate other academic mentors with dignity.

Mentors should creatively inspire their students inviting them to join their research or publications. Many of the mentors point this out (including G. Gołembski, S. Liszewski, and A. Woodside – see appendix). One must pay careful attention, however, to ensure that joint publications correctly describe the proportion of the authors' input, and it is entirely impermissible that a "mentor" or "student" should "appropriate" work, whether consciously or not, if it more belongs to the other half of the partnership.

According to T. Becher and P. Trawler, loyalty to the "tribe" still obliges in contemporary academia, as does rivalry with members of other clans – e.g. economics versus sociology and anthropology. In tourism research, conflicts also occur in discussions on the significance and value of research on the basis of various academic fields and disciplines. There can also be a certain tension in the relationship between research that is chiefly practical and is meant to bring concrete economic results, and theoretical research that concentrates on explaining the functions of the study. Indeed, there are many more such tensions: team or individual research, cheap and expensive research, standard/replicable (e.g. "industrial") research and innovative research, and so on. Certain strains and conflicts emerge between individuals and institutions when it comes to who truly conducts the research, and thus has the right to make use of it.

A mentor should also be conscious of the dangers facing contemporary academia and attempt to counteract them. These include a progressive exploitation and over-economization and commercialization of academia [cf. E. Cohen – see: appendix]. Both these processes have their good and bad sides. A mentor need be aware of this fact, while taking care that they do not bring about another process, which is increasingly evident in modern research: the dehumanization of academia. The role of the mentor is to stand guard to limit the impact of these phenomena, particularly this dehumanization effect. He should be able to skillfully manage the conflicts, tensions, and risks, with the good of academia in view.

Freedom of research and the factors that might hamper it are important issues. Owing to their position in their community, mentors are often subject to fewer restrictions than young scholars. Their task, however, is to

keep from restricting the young scholars' freedom and to support their innovative research ideas, while suggesting worthwhile research paths. The most fundamental restriction to research freedom and academic activity is finances, including the necessity to acquire funding for research. Happily, the situation in tourism is simplified in that – compared to other studies – research is relatively inexpensive. This fact was pointed out by those surveyed in J. Tribe's above-mentioned article, which brings to mind comparisons with research costs for nuclear physics [Tribe, 2010, p. 18]. Social research on tourism is particularly low-cost, as confirmed in the opinion of a famous anthropologist, who wrote in his autobiography: "My twenty-year contribution to the anthropology of tourism has been based on a grand total of only $800 in research funding" [Nash, 2007, p. 72].

Becher and Trawler's research has shown that academic society continues to be controlled by relatively formalized standards, intellectual control, and an unchanging elite [Becher, Trawler, 2001]. According to T.J. Barnes, "anyone wanting to do anything in the discipline needs to make some reference to such points if they are both to be taken seriously, and to do things that they claim to do" [Barnes, 2002, p. 494. quoted in Tribe 2010, p. 28]. According to J. Tribe, this is mainly carried out in tourism (as in other studies) by an academic elite he calls Senior: Key position, Elders, or Gatekeepers. Other important aspects of the "academic reality" can also decide on a career, among which Tribe lists: "a well established invisible college" and "key journals," as well as a phenomenon he calls "departmentalism," which describes the specifics of an organization's system and the management of learning at a college, which can decide upon the distribution of funding, the establishment of work hours, and directions of research, to apply them to the strategies of various departments. This all adds up to a certain group of factors called "Obligatory Passage Points (OPP)" [Tribe, 2010, p. 28]. The way in which these OPPs function, all those factors and procedures, institutions, people, and particularly the decision-making mechanisms, make for a knowledge that the ordinary young researcher has yet to attain. Overcoming these "mandatory stumbling blocks" that every young researcher encounters on his academic path is not always easy. Bearing this in mind, the mentor should help his younger colleagues in grappling with these difficulties.

The ability to steer the student's academic development, one the one hand based on personal experiences, and on the other a knowledge of the experiences of other significant researchers, is one of the mentor's vital tasks. In no way does this mean conformity or submission to expectations, but rather the ability to present one's views and rational activities as leading toward the freedom and value of academic research. Fortunately, the "infor-

mation monitors" in tourism are less rigorous than in other departments. A "senior" of tourism research has written: "I grew up inside of a very, very fusty old Sociology and Anthropology establishment … and there was definitely a sense, you play the game according to their rules and then if you do, you're lucky if they let you in. I don't see that happening for the very reason that Tourism is much more diffuse and it doesn't have the kind of monolithic structure that 1950s and 60s social science had" [Tribe, 2010, p. 29].

For many researchers, the issue of whether to work alone or as part of a group is an important dilemma – and this also involves their aspirations to be a mentor. In modern academia – particularly in the natural sciences and in those where the positivist paradigm is dominant – group work is preferred, but the breakthrough discoveries and most valuable theories continue to be the work of individuals.[13] There are, it is true, certain factors that can set the mentor apart depending on whether his contributions have been more group or individual, but practice shows that someone can deserve to be called a true mentor in either case.

A statement by A.G. Woodside seems a very interesting contribution to the subject of mentorship, presenting the basic factors which lead to it [Woodside – see appendix]. His "prescription" for mentorship – simplified here, for obvious reasons – decidedly emphasizes work, which alongside talent and luck is the key element of success in academia. Rigorous work (in part on oneself) must be accompanied by a special passion, and all the activities of the potential mentor – in both research and teaching – must be based on what I would call academic ethics in the broadest sense (understood most simply as an honest and conscientious approach to the role and tasks we take upon ourselves in becoming part of the academic community). Without these ethics and the other attributes and aspects of academic work listed above, it is hard to imagine someone becoming a mentor in academia. Many of the mentors themselves expressed like opinions, particularly K. Przecławski [see: appendix].

The Paths Which Lead away from Mentorship in Academia

In becoming an academic mentor, bureaucracy is perhaps the greatest obstacle. The bad sides of academic institutionalism and formalities were mentioned, for example, by W. Pytkowski [1985, pp. 368-400]. It is

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[13] To show how little things have changed, we might take the example of Benoit B. Mandelbrot (d. 2010), a brilliant French mathematician and computer scientist (who was born and resided for some time in inter-war Poland), who discovered entirely new "beings" in science he called fractals, and in a state of conflict created the bases of fractal geometry, without which much of today's knowledge and its practical application would be impossible.

his view that sometimes holding a post and academic titles decide more in academic position than actual achievements, which fade somewhat into the background.[14] In our times situations do, unfortunately, occur in which it is insufficient to have talent, knowledge, and great accomplishments to have academic authority – one must also be a "somebody" [ibid., p. 374]. An entirely different, yet equally vital issue is that overburdening with non-academic functions causes mentors to be torn from their academic activity, for which they may simply lack time. K. Przecławski calls attention to the extensive university bureaucracy in his text [see: appendix].

In striving to be a mentor, an excessive and ill-conceived rivalry between scholars can have negative effects. Modern academia offers scholars opportunities of which, until recently, they had been incapable of dreaming. This especially goes for the use of modern technologies in conducting research. Scholars fascinated by progress and growing opportunities to make discoveries, and to research phenomena whose existence, until recently, would never have been expected, to some degree attempt to emulate athletes, trying to set records against others, to see who can accomplish something faster, more etc.[15] Competition between academic centers and researchers is currently heated. On the one hand, it leads to progress in science, but on the other it often means that scholars' activities are driven by egotistical aims, which are opposed to the social values that ought to drive a scholar, and in particular an academic mentor.

An unhealthy rivalry between mentors which does not always follow the principles of academic ethics can indeed reflect badly upon the image of both potential and current mentors (there have been cases, after all, of theories and patents being stolen, of other people's discoveries being claimed, and of conscious "blocking" of younger academics' development). Rivalry between scholars is absolutely normal, and even necessary for progress in academia, but it should always take place strictly in terms of quality and with honesty, according to the principles of academic ethics.

Sometimes paths indicated as leading to academic mentorship turn out to be wrong, or dead ends. In some cases they can even be damaging, both for the scholars themselves and for academia as such. This concerns those

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[14] In his opinion, "only climbing a rung on the ladder of advancement while the knowledge remains where it is, he utterly perfects his administrative ability. Then there remains only 'climbing rungs,' and this is not what Polish academia should be about [the word 'Polish' could be omitted here, as the opinions are universal and can apply to academia as such – W.A]" [Pytkowski, 1985, p. 373].

[15] In extreme cases this academic "race" even leads to a charlatanry of sorts, where study is used for more or less ignoble aims. This takes place, for example, when in conducting essentially pseudo-academic research, one tries – for various reasons (material, ideological, personal) – to graft it onto the hallowed ground of academia [cf.: Gardner, 1952; Anderski, 1972].

academics who, wanting to become mentors in their fields and believing that the number of publications is what sets a researcher's position, strive to publish as much as possible. This has a certain connection with the phenomenon which R. Butler calls "publish or perish" [see: appendix]. Staring at the numbers of their publications, they forget that the real value of academic work is not in quantity but in quality. In extreme cases the result of this false fascination in the greatness of an oeuvre could be a situation wherein a great quantity of publications take the form of a growing pile of rubbish [Pytkowski, 1985, p. 374]. It does happen, after all, that in striving for the swift multiplication of texts, hastily-prepared works are published (generally the result of research prepared at a similar pace), which either require a great deal more work in order to be published, or ought not to be published at all.[16] Sometimes for the prestige of an author it would be better if this work – which can even be shameful – was never published, and his output never grew.

A mentor should never take shortcuts. A person who decides to simplify research procedures at the cost of research quality and accuracy (perhaps even falsifying results) will never be a mentor; nor will someone who uses morally dubious assistance to gain publications (e.g. favoritism in reviewing works). The same concerns something of a similar nature, shortcuts, i.e. ways of simplifying the procedures in achieving various academic titles – perhaps through "manipulations" of currently obliging or changing regulations in places or institutions that grant academic titles and degrees (e.g. the PhDs "done" in some countries) etc. Some researchers attempt through various and not always praiseworthy means to swiftly rack up degrees and academic titles, which does not help their aspirations to become a mentor. The illusoriness of rationality in such actions – which is normally how they are justified – is normally gleaned only years later, when such shortcuts (even if taken long before) prevent the researcher from achieving mentor status, as the academic community is very principled in this matter. R. Butler is correct in saying that lost reputations and reliability can probably never be regained, and that an academic without a reputation and reliability will not make his career ("once a reputation is lost, it has almost certainly gone forever, and an academic without a reputation for integrity is unlikely to be successful in their career") [see: appendix].

In some cases we are dealing with factors that to some degree favor the above-described types of behavior and are justified. We might take for example the difficulties in process of making tourism researchers independent,

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[16] J. Sztumski phrased this well, stating that such works often do not deserve to be called academic, and at best might be called "academicish." To his mind, the terms differ in the same way that "a sweet cup of tea differs from a sugary one" [Sztumski, 2005, p. 31].

in particular acquiring PhDs, and postdoctoral degrees. Researchers who tackle these considerable challenges often encounter numerous formal and administrative obstacles. Among these, one of the most important is that Poland (and many other countries) has a relatively small number of institutions (mainly department councils of colleges) that can confer academic degrees and titles on the basis of research on tourism in its widest definition. In these institutions tourism as such occupies a marginal place among the issues they deal with. Therefore, we often have a situation in which, because of the small number of professors competent in tourism, the dean (on behalf of a department council) denies the possibility of opening PhD or postdoctoral proceedings, regardless of the value of the research. Being aware of this, many talented academics simply forego tourism as the subject of their PhD and postdoctoral research. They fear that their labors will not be crowned with the title they desire, and thus they make the subject of their research an issue that perhaps interests them less than tourism, but which gives them a higher chance of acquiring a PhD or postdoctoral degree. We can assume that only some of them return to tourism research after gaining their degrees, while many – to the obvious detriment of progress in tourism research – abandon tourism research for good [Alejziak, 2003, p. 243]. The upshot of this situation is the very slow growth (and often the decline) of numbers of professors who are able to supervise PhD theses, which in turn causes the above-mentioned difficulties in finding the necessary independent tourism specialists in department councils – and thus we come full circle. We ought to add that this situation is not unique to Poland, but is evident in many countries.

In writing on the factors that distance one from mentorship, we must also make mention of utterly prosaic reasons: that sometimes even a very talented person is not able to properly steer his development and make progress in his academic career. Such a barrier might be in the necessity to tend to the facts of life (one's own or one's family), or an excessive pursuit of money, which has made many potential mentors fall short, as they take on too many obligations. A fine example of this is "multi-contract" work, which R. Winiarski mentions in the context of Polish schools [see: appendix].

Finally, we ought to add that there is a certain group of scholars who are great academic researchers and theorists, but for various reasons they cannot be seen as mentors (at least in the present sense of the word). A frequent cause of this is character traits and certain parts of the personality that can be serious obstacles on the road to becoming a mentor. Some of these attributes – e.g. egocentrism and feeling of superiority, especially when combined with a lack of self-criticism – generate various disputes, and sometimes even hostility, not only between various scholars, but also

between wider circles of academic society (e.g. between chairs, institutes, or colleges). A mentor should be aware of the fact that he need not always be right, and that other researchers (and not only mentors, but also those aspiring to the title) need not always agree with him on every point. Here we come to issues concerning not only prestige and academic status (which is always joined with a measure of subjectivity), but also "precedence" with regards to discoveries and creating new academic theories, a terrain which is fraught with conflicts.

To conclude our observations on the paths leading to academic mentorship and those that lead away from it, I will permit myself a personal observation. It is my impression that it is easier to say what a potential mentor ought *not* to do than to say what his attributes ought to be. Perhaps here is the core of the matter, and perhaps this is what makes a mentor no less rare in contemporary academia than in epochs past, even though there are allegedly more people currently studying than in the combined history of humanity to date.[17]

Conclusions

In our observations on the subject of the academic mentor and the role of outstanding individuals in the development of academia, we ought to take into account the changes that contemporary academia is undergoing. Its transformations to a large degree affect not only the perception of mentors' roles in the academic community, but also their capability of fulfilling the functions and tasks that are traditionally assigned to them. One of the key tendencies characterizing modern academia is its progressive democratization. This is visible in the swift development of study in more underdeveloped countries, and the changes in the social structure of scholars, which includes the greater representation of women. This also concerns tourism research, in which and gender studies strategies and research approaches are of increasing importance. The research coming from countries only recently regarded as "peripheral" is being increasingly noted. There are also growing numbers of researchers coming from these countries who aspire to the role of academic mentors in their fields. All signs point to not only a sort of geographical/ethnic democratization of studies, but also a "critical turn" in tourism research, which sets new chal-

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[17] According to K. Kelly, today's society has the good fortune to live in times of the swiftest and most profound accumulation of human knowledge and culture. In his opinion, more knowledge was gathered in the 20th century than in the whole prior history of humanity, and its resources double every two years [Kelly, 2006. Quoted in: Tapscott, Williams, 2008, p. 220].

lenges before tourism studies. These changes are well-illustrated in the book *Qualitative Research in Tourism. Ontologies, Epistemologies, Methodologies* [Phillmore and Goodson, 2004], which indicates new phenomena and processes tied to the methodology and planning of research and the creation of knowledge in tourism.

The opinions and remarks presented in this article concerning who, at present, might aspire to the role of mentor – both in academia as such, and in this humble segment that concerns tourism – are not, of course, exhaustive. We have tried to present those aspects which might be of fundamental importance for this discussion. The appendix provides the opinions of mentors in tourism research invited to take part in this special edition of *Folia Turistica*, entitled *The Master Classes* (their works are published in the first volume of this edition), as well as a few outstanding Polish mentors, representing the basic academic disciplines engaged in tourism research. Their opinions have been used in writing this article, and the texts we have gathered (written specially for this project) are valuable enough that we have decided to include them in their entirety, in the form of a special appendix, to which I draw the reader's attention.

Postscript

It would seem that both the articles presented in the epilogue of this special edition of *Folia Turistica*, as well as the above-mentioned appendix with mentors' responses, could be seen as a starting point for discussions on the role of mentors in the development of tourism research, which should be the topic of ongoing discussion in academic circles.

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Appendix

Opinions gathered for **The Role of the Mentor in Contemporary Academia, Based on Tourism Studies** were submitted by selected tourism researchers and experts in response to a request sent in by the authors of the present article. It consists of two parts. The first contains an identical letter sent to thirteen foreign and Polish professors, representing various fields of tourism research (see below), explaining the issues we set out to deal with in our article, and the statements they submitted, presented intact (in a later part of the appendix).

Dear Professor,

*I have one more kind request to you as a Master (Eminent Scholar) of tourism research. As part of our project, we would like to add a kind of introduction, preface, editorial or an epilogue with a tentative title **"The role of "Masters" (Eminent Scholars) in contemporary science: the case of tourism research".** Hence, I would be extremely grateful if you could present your standpoint in the above-mentioned subject matter in a form of a short text (half to maximum one page). In relation to the title of this planned editorial/preface, such a text would be a kind of an answer to the fundamental question (or rather a voice in the discussion): "What is the role of masters (i.e. eminent scholars recognized worldwide) in contemporary science, especially in the case of such relatively new disciplines (research fields) as tourism?" We would like to ask the same question to all 8 masters (eminent scholars) contributing to our volume. Additionally, we will also ask several other prominent tourism researchers from Poland and abroad. We would not like in any case to constrain your freedom of expression or to limit the format of your opinion on this subject as we are fully aware of the complexity of the matter and the fact that it does not solely belong to the world of science. Hence, we do not expect any uniform conclusions but rather pointing to certain roles and tasks of masters in such aspects as: staff development (especially young researchers), integration of tourism research community (also international integration), quality of research studies, developing tourism research methodology, identifying/setting new trends and (which seems extremely important) setting ethical standards in science etc. We would also like to find out if – in your opinion – the role and position of research masters is rather invariable or it has changed in recent years. Do you think that this role and position is likely to undergo any (r)evolutions in a foreseeable future? If so, what kind of changes do you anticipate? I have to admit that we have not yet adopted a particular text form,*

in which your opinions will be presented. As for now I do believe that the best idea is simply to quote your opinions on the above subject matter in an organized manner. Apart from this there will be an introduction to current issues of tourism research and presentation of our view in a broader context (I prepare such a text with Prof. Owsianowska). To cut a long story short, I would be extremely grateful if you could write at least a few sentences on this subject. May I expect any such text from you? Once again, thank you in advance for your contribution and devoted time.

Kindest regards, Wieslaw Alejziak
(scientific editor of special edition of "Folia Turistica – *The Master Classes"*).

The letter was sent to the following professors: Richard W. Butler (Great Britain), Eric Cohen (Israel), Graham M.S. Dann (Norway), Grzegorz Gołembski (Poland), Metin Kozak (Turkey), Stanisław Liszewski (Poland), Andrzej Matuszyk (Poland), Douglas G. Pearce (N. Zeland), Philip L. Pearce (Australia), Krzysztof Przecławski (Poland), H. Leo Theuns (Holland), Ryszard W. Winiarski (Poland) and Arch G. Woodside (USA). **They all sent in their (more or less) extended opinions on the subject.**

Richard W. Butler:

The Role of Masters (Eminent Scholars) in Contemporary Science: The Case of Tourism Research

In writing this short piece I am guided by the questions about the possible roles of Masters posed in the invitation: "staff development (especially young researchers), integration of tourism research community (also international integration), quality of research studies, developing tourism research methodology, identifying/setting new trends and (which seems extremely important) setting ethical standards in science etc. if the role and position of research masters is rather invariable or it has changed in recent years, is this role and position likely to undergo any (r)evolutions in a foreseeable future?"

One would perhaps feel more comfortable and less ego-centric if "Eminent Scholar" was to be replaced with "Aged or Elderly Scholar"! In that vein, I will make the following remarks. One aspect which I think of considerable importance in our current world of rapid knowledge development and transfer, is to remind younger researchers of tourism's history. Not the history of tourism, although that is important, but in essence, where tourism research has come from, and what we have learned (and perhaps forgotten or missed). Many scholars today search the tourism literature for recent articles on their subject, and as such, are likely to miss anything beyond a decade or so old, other than a few very commonly cited pieces. One example is carrying capacity, a topic of great importance in the tourism literature three decades ago and now virtually absent from journals. One can understand new researchers assuming there has been little or nothing written on carrying capacity if they search journals for say 20 years back, but in fact there is a great deal of knowledge and research findings from the 1960s that still have great relevance today. Those of us around in the 1960s (and capable of remembering academic material from that decade) however, have some knowledge of that information and can pass it on, both in our writing, where applicable, and in teaching and supervision.

This also relates to another point above, staff development. Young academic staff in the present day have many, often unreasonable, demands on their time, and hopefully "Masters" can save them time (and possible embarrassment) by advising on sources, viewpoints, and possible pitfalls. As well, we may be able to suggest potential research contacts and colleagues,

sometimes in distant parts, with whom they might otherwise never come into contact, based on our own personal contacts, travels and experience. This can lead to the integration of, or at least improved linkage between, international groups of scholars which can be helpful in applications for research funding, potential research students and future referees.

Older researchers may, not always though, have read beyond tourism in other more traditional subject areas and thus be able to suggest methodologies and approaches that are not well used in tourism research and may not be "found" by new researchers. This is, of course, a two way street, as young researchers are often less hide-bound and traditional in their approaches than more elderly ones, and thus may introduce their "masters" to new techniques and approaches also.

One might like to think that mature scholars can afford to adopt a highly ethical approach to research, given that the pressures of "publish or perish" are less applicable to them, and they may have reached the highest rank in their field, so the need for promotion that may be dependent on additional publications might not drive them to cut corners or be less ethical in their research. This also is not necessarily true, an "old dog" may be too familiar with how to deal with tricky ethical or moral issues to always follow the appropriate line, but one would hope that mature scholars would strongly advise younger researchers of the importance of integrity and the fact that once a reputation is lost, it has almost certainly gone forever, and an academic without a reputation for integrity is unlikely to be successful in their career.

Thus perhaps it is not so much "do as I say or have done" as much as "learn from what I have done or failed to do" in order to do better and develop one's career and reputation. Academia is an iterative process, that is, we build and develop on what has gone before, whatever discipline we are in and whatever subject we are studying. If we fail to develop knowledge, research techniques and methodologies, and make contributions in our chosen field, we will very quickly become irrelevant as a researcher. Increasingly these days that means gaining research funding, along with presenting and publishing papers. Senior scholars should be able to assist with suggesting where and for what to try to secure research funds and where and what to try to publish. Hopefully such information would come as advice, for the final decision must always be that of the individual and asking advice does not mean the advice given has to be followed. Not following it may be a mistake, but a bigger mistake is not to seek advice in the first place. Almost everything we do can be improved, and having an experienced eye look over proposals, presentations, and manuscripts is one of the benefits that can be gained from contact with a senior scholar.

Whether senior scholars are likely to be trend setters is perhaps less likely, but they should be in a position to make meaningful comments on possible trends and possibilities based on their experience. Critical and even negative comments on new ideas can be as useful as enthusiastic support in the right context, what is important in such a relationship is trust, that is, faith that the advice is genuine and sincere. Overall I am tempted to conclude that the role of Master or Mentor has not changed greatly over the centuries and is unlikely to change greatly in the years ahead. How advice is given and the subjects it is given on have changed greatly, but advising, supporting, and nurturing new and developing talent is perhaps the most important role that a Master can play in academic life.

Eric Cohen:

As I have said in my previous communication, I do not consider myself a "master" and am quite embarrassed to write about myself in this vein. I also want to point out that I am a sociologist and anthropologist who works in the tourism field as in several others, and grew up in a disciplinary department and not in a "tourism school". Hence some of your questions are not relevant in my case – I was the only one working in the field in the Dept. of Sociology and Anthropology at the Hebrew U., so no "staff requirements" emerged. Only recently has tourism become a popular academic topic at Israeli Universities, but by then I was retired and living in Thailand.

Some attempts have been made to integrate tourism studies on a global level, particularly the founding of the IAST (International Academy for the Study of Tourism) in 1986, in which I participated. However, the Academy changed its character significantly since then – becoming more of a professional association of tourism experts from tourism departments and schools, and less of an institution devoted to basic theoretical issues. This very much reflects the general turn in tourism studies in the last quarter century; the field became dominated by tourism management and business professionals. My impression is that the differentiation in the field has increased to such an extent, that I have little in common with people in many of the sub-specialities which have emerged over time. This impression was strengthened by the recent IAST Conference, where I found few people with whom I share common research or theoretical interests.

My own work has in recent years moved in two somewhat contrasting directions: on the one hand major theoretical issues (I am completing an article on "authentication" with a colleague) and on the other on case stud-

ies, which look at tourism issues as reflections of wider sociological issues in Thai society (see my book *Explorations in Thai Tourism*, Emerald 2008). I am trying to break new ground in both of these directions in my current work, in order to remain relevant, despite isolation in Thailand and approaching old age.

Graham M. S. Dann:

The Role of Recognised Scholars in Providing Contemporary Theoretical Understanding: The Case of Tourism Research

Whether one calls them "recognised scholars" or "eminent experts", the truth of the matter is that, certainly as far as the sociology/anthropology of tourism is concerned, they have contributed theoretical insights that have not yet been adequately superseded. In the Anglophone world at least, and in spite of their earlier European origins, these theoretical insights of the 1970s, 1980s and 1990s (principally the paradigms of authenticity, stranger-hood, play and constructivism) have been communicated to the English speaking world over and over again to the point that we appear to have reached a theoretical impasse. Furthermore, patterns of quotation of these same ideas have seen to it that the citation-based reputations of their originators remain virtually unchallenged. Advances in the field of tourism research thus appear to be factionalised into two main camps: "the golden oldies" and "the rising stars". Outside this major division are those inactive persons who simply cite the "founding fathers" ritualistically without contributing anything new of their own.

How then can this situation be changed? The first possibility builds on the realisation that most of the experts have not been trained in tourism. Thus inputs can and should be made by others who rely on the praxis of the field with which they are more familiar. The second opportunity resides in the dialectical nature of theory itself. Therefore, while some of the more robust elements of original theses can be maintained, they also need to be challenged by antitheses which in turn lead to syntheses. (Here one thinks for instance of the critical turn in tourism studies). Thirdly, whereas most of the recognised scholars address their audiences in English, the extended language skills of a younger generation of scholars should challenge conventional wisdom to the level where ideas are transmitted in other tongues,

thereby reinforcing the international, cross-cultural nature of tourism itself. Fourthly, more imaginative methods of communication should be adopted that obviate the monological discourses of yesteryear by replacing them with debate that is more dialogical in nature. Such an innovation would apply both to journal articles (especially the refereeing process) and to conference presentations (round tables). Undoubtedly, too, there are many more suggestions that need to be made and maximised in order that the whole academic treatment of tourism can be less reliant on the past and more geared towards the future.

Grzegorz Gołembski:

The measure of a professor's greatness is not only his achievements (which can become obsolete) but the research personnel that he is able to promote and educate, both in terms of quantity and quality. The selection of people is the first prerequisite for success. It must be made after a longer observation of candidates, beginning with their studies. It is difficult to determine the full rationale of this selection. Both the student's skills and personality must be taken into account. Success in creating a research team is made by showing respect for the young person, by the professor's own example, and by assistance in developing academic research.

Respect for young people is shown through support. One must inspire self-confidence in young people, one must show that, when in difficulty, they can count on the professor, that they are not alone. The measure of respect is the ability to discuss and recognize the opinions of young people, even when their thinking is not yet fully mature. One must reject authoritarianism, which does not mean reducing requirements. The measure of respect is fair treatment for everyone in the team (equal responsibilities), and being interested in and mindful of workers' problems. All this creates an atmosphere conducive to academic development. This atmosphere should be reinforced through personal example.

By "personal example" we mean mainly hard work and the demands one makes on oneself – pressing on, in spite of one's previous achievements. Honesty is another sort of personal example, as are writing original papers and a lack of self-indulgence, despite the growing demands posed by global science.

Head professors ("mentor" is too big a word for me) can and should use their abilities to help young people develop research. Above all, they are to give assistance in finding foreign contacts with individuals and reputed re-

search centers, conducting joint research, ensuring participation in international conferences abroad, making contacts with foreign professors, joint research publications – all this is almost guaranteed to improve the quality of young academics' techniques. And then it is legitimate to ask young people to write joint papers, to increase their visibility in the academic community. Facilitating local contacts, including representatives of local governments and business, is also important.

I do not support the idea of imposing research issues or research strategies and methods on young people. I think that if they are paid respect, observe the work of their teacher, and above all, if they have some international experience, they can manage on their own. And they do.

Finally, I would like to share my opinion on the worst thing Polish tourism research. This research is "fashionable," just as the "Tourism and Recreation" is fashionable as a subject. There are plenty of new centers and beginners. There is nothing wrong with this. If, however, people working in these centers make as many publications as possible – superficial ones that often preach to the converted, including compilations for Polish publishing houses that will publish anything for money – then this is a dangerous phenomenon which should not be accepted. These things corrupt young people by lowering the standard and raising insurmountable barriers for international contacts with the world's leading academic centers.

Metin Kozak:

From an optimistic point of view, masters that can also be called "academically mature or well-experienced" scholars have a great responsibility in shaping the future of tourism research and guiding their "academically immature or young" counterparts. Specifically, masters have two key roles in this respect: First, they are expected to contribute to the expansion of the current literature by looking at the issues from different perspectives. Second, they should take the responsibility of playing a role model for others under a supervision to emphasize the importance of following the right directions alongside the journey of their academic career. However, from the pessimistic point of view, I have several reservations about the future of tourism research and the way that masters keep this line of research moving forward and that young generations will take their positions to have inspirations and self-confidence with the purpose of strengthening the quality of tourism research. Thus, we should refer to the main characteristics

of tourism research as being one of the youngest or still emerging fields of expertise around the world as well as one that requires a long period of time to dig into the bottom line. From a global perspective, with the remarkable growth of tourism schools and scholars both in quantity and quality over the last three or four decades, the value of tourism research has spread into many countries from west to east. These figures are likely to grow faster over the coming years while there will also be a similar pattern of development in other indicators, such as the number of publications and publication outlets etc. Therefore, as the actual masters of today and as the potential for tomorrow, our next priority should involve thinking of how to enhance the quality of tourism research from academic and practical perspectives other than the quantity that appears to be more subjective. In doing so, with its interdisciplinary feature, tourism research will become a crossroad allowing other disciplines to focus on the related common subjects interchangeably and intellectually.

Stanislaw Liszewski:

In the field of knowledge I represent (geographical sciences) the term "mentor" is normally associated with an academic school or a research team, so my statement will concern more the activities than the personality of the "mentor."

Modern science generally develops down two parallel paths: the first we owe to brilliant individuals, who alone create new ideas which are often fundamental for the development of academic theory. Today, this mainly concerns theoretical disciplines, such as philosophy, theoretical physics, legal theory, or mathematics. Of course, these are exceptional scholars whose achievements are timeless – they are "mentors" of world science.

Scientific schools or research teams whose achievements are the result of an accumulation of the thoughts and work of many scholars who sometimes represent various academic fields and disciplines, however, are definitely more involved in the development of modern science. A "mentor" is present here too, as a leader, initiator, organizer, educator, and promoter of academic research.

Who is the other "mentor"? This is a person endowed with outstanding intellect, who has extensive knowledge, who observes the changing world, is a good organizer, a true academic and moral authority, who cares about honesty and the correctness of research.

For "mentors" thus defined to create a school, certain conditions must be satisfied. They must present an original research problem that has yet to be solved, which is so important and attractive that it is worth the intellectual labour, and sometimes the physical effort, of many people (students and co-workers) gathering around the "mentor." Solutions require these researchers to find (discover, adapt) their own research tools, i.e. to develop their own methods of research. The school of the "mentor," as I already mentioned, is created by their students and co-workers, i.e. a team of people who identify themselves, at least in the initial period of research, with the creator of the school and its research concepts, choosing to work together to solve a specific problem, using specific methods. An academic school must also be able to publish their research results and submit them to external evaluation. Hence, an intrinsic part of an academic school is the seminars and conferences it organizes, and the publishing of research in articles, monographs, as well as in a special journal founded on the "mentor's" initiative.

The durability of such a school depends on many factors, of which two seem the most important.

These are: the creation of new, original, research problems, important from a theoretical and cognitive point of view, and creating conditions for the unhindered development of students by their mentor, who should promote the worthy academic research results of his students.

Geographical research on the phenomenon of tourism has for many years addressed a fundamental problem, which is the "tourist space" in which this phenomenon takes place. It seems that a concentration of research in recent years at the Łódź geographical center has "infected" many young researchers with this concept, which seems to confirm the existence of a scientific school of tourism geography in Łódź.

The author's opinions on the "mentor" and academic schools have been expressed on several occasions, including the following works:
– *Łódź akademicka wczoraj, dziś i jutro. Mistrz – uczeń. Wyobrażenia czy rzeczywistość czyli o tworzeniu szkół naukowych*, ed. E. Marynowicz-Hetka, Łódzkie Towarzystwo Naukowe, Łódź, 1997, pp. 39–42.
– *Łódzkie szkoły geograficzne*, [in:] *Rola nauczycieli łódzkich w tworzeniu dziedzictwa kulturowego Łodzi*, ed. S. Gala, Łódzkie Towarzystwo Naukowe, Łódź, 1998, pp. 385–406.
– *Łódzka szkoła geografii społeczno-ekonomicznej. Dyskusja wokół sylwetki mistrza – profesora Ludwika Straszewicza*, ed. S. Liszewski, z. 1, Łódzkie Towarzystwo Naukowe, Łódź, 2009, pp. 11–16, 42–50.

Andrzej Matuszyk:

Mentor or Authority?

The notions of "authority" and "mentor" are not synonymous. Even the greatest (academic) authority need not have a certain attribute which goes to make a mentor – Władysław Stróżewski colorfully called this quality the **"radiance of the mentor"** [Stróżewski, 2007].

And thus, to be considered a mentor (in university academics) it does not suffice – as is the case with "being an authority" – to have mere fluency, perfectionism, or even knowledge in terms of discovering new horizons. As Stróżewski puts it, the **person should also testify** to the importance to the importance of what is being done. With a mentor, by this definition, his work and knowledge "carry through a personality" [Ibid.]. Therefore this "radiance of the mentor" is – above all – **the radiance of his personality.** It is not only the knowledge communicated by the mentor, but **the man himself within it** who gets through to others, Stróżewski seems to claim. We sometimes speak of someone's "academic personality." We are then no doubt considering something more than just the mentor's work in itself, not just the "pure" – i.e. purely scientific – valor. We are considering the unique attributes of the work, which also express what we might call his "axiological radiance," and thus the **values** implicitly contained in its intellectual content.

(From this point of view, my model of the mentor in the sphere of humanist tourism knowledge, owing to his past work, was Krzysztof Przecławski – the first major Polish sociologist and tourism teacher, today objectively considered an intellectual and moral authority in our field – his work, after all, is strongly marked by ethical values. Regarding the "axiological radiance," I, a tourism teacher, could also to some extent regard child and youth tourism instructors Kazimierz Denek and Tadeusz Łobożewicz as mentors. Though they have surely **never been great academic authorities**, their studies and articles – apart from being valuable sources of practical knowledge on tourism methodology – are examples of fiery **pedagogical ideology**, I would even say "pedagogical love": **they can "infect" the reader** with their great enthusiasm for the research they describe.)

The second condition qualifying a mentor, **a condition *sine qua non*** – is the **communication** of his/her knowledge or work. **Precisely: communication. "There can be no mentor who does not impart his wis-**

dom,**"** says Stróżewski, who goes on to quote a beautiful Dominican phrase: *Contemplata aliis tradere,* i.e. what has been contemplated should be imparted to others.

In the Polish Academy of Sciences article entitled "Good Academic Practice," where – quite significantly – a **separate chapter is devoted to the academic worker as a mentor**[18]), we read that "the academic [as a mentor] should impart knowledge, abilities, and the principles of good scientific practice to his/her students through words and by example" [PAN 1994, p. 13]. Apart from knowledge and the results of his/her study, along with his/her hierarchy of values connected with the subject of the research passions, the mentor is to impart **secrets of technique**: methods through which learning takes place. (The mentor accomplishes this, Stróżewski says, by agreeing to view his activities through his students and their participation in their work. The greatness of the mentor is in the fact that (s)he can perform this with kindness, with a readiness to help and to sacrifice his/her own time[19]). Moreover, the mentor is to "serve the moral dispositions [of the students], shaping a sense of duty and responsibility in them" [Neyman 2005].

Stróżewski indicates a few more attributes of a real mentor: it is a poor mentor, he says, who keeps all the secrets to himself out of a jealous fear that someone could improve upon his work. Indeed: **a real mentor closes no doors to the student so as to do things better** (as a model example we might take the often cited relationship between Elsner and Chopin). Another quality of the mentor is his/her **openness to the student's individuality.** Confucius said of his student: "I had no use for Yan Hui: He agreed with everything I said" [Ibid]. The greatness of the mentor is in being able to **value the individual character and talent** of the student, allowing or even helping him/her to grow in his/her own fashion. Stróżewski gives the splendid example of Husserl and his students – Roman Ingarden and Edith Stein [Stróżewski 2007].

To sum up, we might say that a mentor is someone who is not only a **real (!) authority,**[20] but also someone **who has taught others a great**

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[18] Katarzyna Olbrycht pointed out this significant fact in her text, "Współczesne pytania wokół relacji 'mistrz-uczeń'" [Contemporary Issues Surrounding the Mentor-Student Relationship, Olbrycht 1998].

[19] From a lecture by W. Stróżewski, for a session devoted to the issue of the mentor and student, organized at the Jagiellonian University in 1966 [quoted from Olbrycht, 1998].

[20] The role of authorities in the humanities can have an ambivalent quality. They improve, inspire, push science forward, as the work of great academic personalities allows others to discover new aspects of the reality being researched or the ways of encountering and describing it. It does happen, however, that appealing to recognized academic celebrities is a purely formal tactic: it appears to belong to the sphere of "academic correctness" (analogous from an ethical perspective to "political correctness"), and is meant to signal the erudition of the quoting

deal. Out of two lecturers and authorities, equally wise and competent, the mentor is the one who runs his lectures in a more transparent, compelling, convincing, moving, or inspiring fashion. A person is a mentor, a model/ mentor, a leader/mentor when (s)he is so deemed by at least one student. "The students make the person a mentor," says Stróżowski [2007]. I would add: **the students, not the number of quotations. The students, and not the emulators and claquers who quote him/her.**

To conclude, I would like to pause a moment upon a fairly special (and frequently noted) aspect of the role of the mentor in the "mentor/student" relationship. I will quote from Katarzyna Olbrycht[21] a fragment of a statement by professor Jan Błoński concerning Professor Kazimierz Wyka, found in a book by Zofia Szlachta, entitled *The Mentor*:

"I believe that everywhere we go," Błoński writes, "we are searching for indoctrination, an entry to a world others cannot visit […] and then we seek a mentor. But the mentor is someone who appears in a given moment and gives us hope of being taken to the promised land. **There is some magic involved here...** [my emphasis – A.M.]." In the commentary to this statement the author speaks of the "**mystery** of the mentor/student relationship." She surely had in mind the mental complexity of the two roles and, I believe, the mentor's possession of qualities that defy rationality, that are perhaps somewhat "metaphysical," and which we sometimes call "charisma," or a "vocation," and of whose existence the mentor is not always aware.

In this "mystery" of which Katarzyna Olbrycht writes seems to be a certain peculiarity of the "mentor/student" relationship which common wisdom has formulated in the conviction that, if the student does not surpass his mentor, the mentor is less than perfect, often illustrated by recalling the aforementioned example of Elsner and Chopin. **Thus the mentor need not be a towering figure objectively, but only to have the gift of effective communication**: intellectual fertilization, inspiration, evocation.[22]

"Why him? Why *him* precisely?" asks the aforementioned author of *The Mentor*, "This shy, unassuming person. Hesitant and awkward. Thick eyeglasses. […] A mentor? He would bury his head in the sand if he heard

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author. It happens that appealing to authority fills the role of an axiom: the quote is to shut the mouths of any opponents, eliminate discussion, decide upon the accuracy of the opinion, obscure the intellectual frailty of certain concepts. Science has both real and pseudo-authorities. Stanisław Andreski, the author of the famous "Czarnoksiestwo w naukach społecznych", includes among the mechanisms creating pseudo-authority in the social sciences the use of a "jargon smokescreen" by pseudo-scholars, or "hiding behind a screen of methodology."

[21] K. Olbrycht, op. cit.

[22] Who can say if in sports it isn't brilliant trainers – the silent supporting characters who, though in most cases never have been the most outstanding competitors themselves, have created great athletes – that should be officially considered the masters, and not their trainees.

such a thing. He winces at the very sound of the word […] he's been explaining for years that he is not even really a professor […]. He hides behind the meager title of "academic teacher," and behind his bibliographies, his lists… And yet he, the mentor, is a person who, through his **very […] personality, makes the first strides into the student's personality**. S**omeone like this makes it through to students, even if he is unaware, even if this was not his goal…**" [my emphasis – A. M.].

The essence of "being a mentor" is thus the ability to bring out greatness in others.

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Douglas G. Pearce:

Master is not a term that I would use to describe myself; rather I would see myself as someone who has a long experience of researching diverse aspects of tourism in different parts of the world. What role should such scholars play? In general terms it is one of leadership. In particular we have a role in mentoring younger colleagues and postgraduate students working in the field through advice, encouragement and guidance; through incorporating them in projects we might be leading; and in jointly authored articles. Depth and breadth of experience in the field also means

we are often well placed to identify and comment on major trends and issues in a field that continues to be quite fragmented. This role is demonstrated well by the review papers presented at the 20th Anniversary meeting of the International Academy for the Study of Tourism held in 2009 and subsequently published as *Tourism Research: a 20-20 vision* edited by D. Pearce and R. Butler [Goodfellow, Oxford, 2010]. Each of these papers presents a state of the art review of research on major topics in tourism research, together with suggestions that future research on those themes might take.

Philip L. Pearce:

A View from a Master in Tourism

Those researchers and educators with considerable experience in tourism study have several roles they can play in the further development of the study area. The basis for any influence a "Master" may have is driven by respect. Such respect is given not because they are simply older or occupy more senior positions but because they have and continue to provide research ideas and engage with others in a personable and encouraging fashion. Building on the respect which is generated both by written quality productivity and personal charm, an experienced Master can inspire younger and less experienced colleagues. One of the more flattering and important remarks is when a junior colleague wants to be like a Master, not a replica but the same kind of figure in their own future age of maturity. Staff development then is not just a local topic of interest but can be international. A Master, both through text and talk, can foster enthusiasm and passion for knowing more about tourism across continents. Senior scholars then should be willing to travel and reach out to others, to continue to write and to co-author with fresh academic figures.

The current group of Masters were mostly brave individualists as they were prepared to work in an area of study which was not core to many universities and departments. They should not lose that sense of bravado, the willingness to do new things as they grow into more comfortable academic positions. The landscape of tourism is not yet fully explored, the settlements which represent study topics are small and the sustainable development of the field is going to demand new methods to build our community. Tech-

nology can give us some methods, varying the paradigms within which we work can give us more tools and working with other disciplines can benefit us most of all.

In particular we need a view of tourism which sees it as a phenomenon to be incorporated into many academic and public discussions. We should not fight a battle for our little territory of tourism study but like tourists themselves take our interests and travel to the tables of those who do research in psychology, sociology, medicine, geography , economics and several other key areas. In this way we will be an active roving band of "researcher warriors" finding ideas and places to insert tourism into conversations where some others would forget its existence. The respect for Masters themselves is one issue of interest but the respect for the field is mostly likely to be generated by co-operative publishing whether that is in fields as technical as travel medicine, engineering or architecture. It is still quite surprising how naïve and amateurish some of the scholars in these fields are concerning such topics as tourism markets and visitors' need s, but the key to educating them is to sit with them, write with them and argue with them , not direct them to specific journals and rest contentedly within our own publications circle.

There is a slightly cruel jibe in the world of sports… "the older he gets, the greater he was." It is healthy for Masters to remember that they made mistakes, did rash things, suffered rejections, did not always write well or do correct analyses. But they persisted and they progressed, until ultimately someone decided that they could be entitled to some recognition. It is likely to always be the same for the academics of the next 50 years, although how they work may be unpredictably novel for those now providing advice.

Krzysztof Przeclawski:

Who Is a Professor?

Freedom is a right of a scientist, and honesty is an obligation. In the past, honesty was a privilege of king's jesters, for it was not taken seriously. Now, honesty should be the price for the scientist's freedom.
(Ludwik Hirszfeld)

A profession – an eminent declaration of a credo. A profession is a *mission*. It is in service to the truth. The Webster Dictionary defines a professor as "a university teacher of the highest rank among the faculty" ("a faculty

member of the highest academic rank at an institution of higher education"). There are different types of professors:

- A professor - researcher, often perceived as a "true" professor. Frequently however, university students interfere with the mission of a professor-researcher. I recall a distinguished professor ("*nomina sunt odiosa...*") who used to say that – were it not for the necessity of teaching and the presence of students – his profession would be very attractive...
- A professor-discoverer, a creative individual who opens new ways and envisions new horizons.
- A professor-teacher. Hirszfeld wrote: "A good teacher should give the students not only a set of facts, not only formal knowledge, but should also inspire discovery and excitement by the originality of his/her approach." A professor-teacher fulfills Hirszfeld's idea by appreciating the presence of students –conveying knowledge, and enjoying the interactivity of the process.
- A professor-organizer of intellectual activities, who serves as an academic dean, provost, chairman, or an academic administrator. Rather than creatively contributing to intellectual life, a professor-organizer manages and facilitates an intellectually stimulating environment.
- A professor-politician; there are many titled politicians. They derive financial benefits. However, does full involvement in politics not entail resignation from academic or scientific work in practice (at least for a period of time)?
- A professor-propagator (communicator), perhaps less creative or original on a theoretical level, who demonstrates the crucial ability to popularize scientific knowledge. Popularization, however, requires a lot of creativity. Popular publications on scientific topics are part of the professor-propagator's work.

Analyzing the biographies of different academics we can see the dominance of one type of professor over the others. Most of all, however, we have to remember that we should not simply convey knowledge without conducting any research of our own. As the saying goes: "Z próżnego i sam Salomon nie naleje" (Even King Salomon cannot make something out of nothing). Nevertheless, in my opinion it is desirable that every professor has at least minimal interest in conveying knowledge. In some sense, teaching reinforces our research.

I believe that becoming a *mentor, a guru,* should be the ultimate goal of every professor. A mentor is an intellectual leader; perhaps also a spiritual leader, maybe a prophet – someone with vision and wisdom. A mentor is a person who creates a school of thought, and who has followers. Ludwik Hirszfeld expressed this by saying: "If at any time I dreamed how I would

like to be remembered by the youth, it was not as a professor, or – God forbid! – a director, but as a gardener of human souls. I thought that life's mission was to work to deserve this."

It is imperative that a professor be a very ethical person, for – metaphorically speaking – a professor stands on a pedestal. One measure of being ethical is the professor-student rapport. Briefly speaking, a professor should be convinced that his or her main task and obligation (I write this with all responsibility) is to *serve* students. In this case, "to serve" means mostly to demand! But to demand from genuinely welcoming standpoint; not from – forgive me! – the position of an army sergeant. A professor should accept the responsibility of helping students to think independently, critically, with intellectual rigor, and should cultivate inspiring anxiety. By personal example, a professor should teach clarity and precision in formulating thoughts and expressing them in ordinary language and in academic terms. A professor must constantly improve his/her own qualifications and be well prepared for *every* lecture and class!

I believe that a professor's rapport with students should be *welcoming* and friendly (this is easily detected by students) and – by the same token – *demanding*. Students should feel that the professor likes them and appreciates working with them. The professor should not be phony, should not pretend, and should always remain him or herself. *Serving* students by teaching them how to think, observe, understand, and work should be the professor's *guiding principle*. Therefore, a professor should never ridicule a student; on the contrary, (s)he should bring to light what is good and valuable, and should offer encouragement, using positive phrases such as "I know you can do better," "you will succeed," or "you can do it"!

Intellectual rigor is professor's great obligation. We know very well that scientific work often calls for great patience, perseverance, and years of waiting for results. Didactic work is often arduous and unappreciated. Academic bureaucracy may pose additional complications. However, intellectual rigor is imperative, and must under no circumstances be compromised. It is desirable, especially in the contemporary world, that a professor knows how to cooperate with others, be a valuable team player, and a responsible team leader.

The professor's rewards are remarkable. They include enjoyment from accomplishments in the academic process, from discovering or realizing something new. Sometimes, they are satisfaction from the fact that others are following the same paths, and that one has inspired a new school of thought. They are also the simple pleasure stemming from recognition given by students; contentment that they spontaneously attend the classes and lectures in large numbers. They are fulfillment in opening "a window to the world" to listeners.

For a professor, every master's thesis under his or her guidance is a spiritual revitalization, and every doctoral dissertation – a fulfilling awareness of the continuity of the professor's work, and an awareness of leaving creative followers, and actually creating a "school of thought."

Kindness shown by the students every day and the compelling feeling that they need us – these are the sources of truly deep, irrevocable gratification! Besides, don't we sometimes feel rejuvenated working with students? We tend to forget that there is a generation gap, at times a gap of not one, but two generations.

All quotations come: Ludwik Hirszfeld (1964)*, MYSLI,* Ossolineum, Wroclaw, pp: 29, 35, 32.

H. Leo Theuns:

Some Notes on Increasing the Credibility and Acceptance of Academic Tourism Research

When engaging, as an economist, in research on tourism the first problem encountered consists of the fact that tourism is not a standard economic sector which would allow a clear definition and delimitation from the supply side, but is defined from the demand side. As a consequence the contribution of tourism to GDP is not easily detectable, and tourism, viewed by non-tourism specialists as comprising recreational travel only, is associated primarily as a frivolous form of non-essential consumption. No wonder that the study of tourism is not part of the mainstream in economics, but considered to be peripheral, which implies that it is unable to claim an eminent position in the practice of economic science. The low value that is thus attributed to the study of tourism can be mitigated only by rigorous research which meets high scientific quality standards. Although tourism is a multifaceted phenomenon which attracts the attention of scientists from many (mainly social) disciplines, it is in view of the above a prerequisite to develop a solid mono-disciplinary knowledge base before spreading out to multidisciplinary research. The quality to be attained in multidisciplinary research ultimately depends on the quality attained in the mono-disciplines that provide the component parts. Acceptance in the academic community of tourism as a valid subject for research can be increased only in such a way.

A second point has to do with the value of academic research in framing tourism planning, development and management policies, in other words how to bridge the gap between academic theory and daily practice. Sophisticated and/or esoteric academic research may have its use as a means to further an academic career and/or to impress the (layman) political decision maker, but is rarely understood and appreciated by those who have to draw up and implement tourism policies. Economics is common sense made difficult. In some cases common sense is out of sight and only the difficulty remains. More than a quarter century ago Medlik already stressed the importance of research being communicated in a language understandable to a layman and a non specialist, and Lickorish observed "I have not found the ( ) over-elaborate technical approaches, sometimes favoured in academic circles, to be easily understood or practical" cf. Theuns, H. Leo: *Tourism Research Priorities; A Survey of Expert Opinions with Special Reference to Developing Countries.* Aix-en-Provence, Centre des Hautes Etudes Touristiques, 1984. The credibility of academic tourism research among practitioners will increase only if sensible research results are communicated in an understandable way.

Probably the most important subject on which further academic research is needed and should provide more unambiguous clarity is the measurement of (acceptable) trade-offs between on the one side mostly economic benefits and on the other side mostly social, psychological, and ecological costs accruing from different types of tourism development in different destination settings (comprehensive differential impact assessment). This subject is an extension of one of the priority areas for research signaled by experts in the 1984 survey.

The above 'requirements' apply equally to both senior and junior researchers, but the seniors might set the tone by providing leadership by example.

Ryszard Winiarski:

The Role of the Mentor in Tourism Studies

The mentor is a person supreme among his/her peers in terms of knowledge or skills. The attributes of academic mastery are commonly known, as they have long been the subject of analysis of philosophers, pedagogues, and experts. These people undoubtedly have the highest technical mastery and

top intellectual skills. But a mentor is not only an academic authority, (s)he is also a model person – both a creator of knowledge and an educator of those who create knowledge. Therefore, a mentor must have students and followers. Being one's own model makes no sense. A mentor is also able to infect others with a passion for learning, someone who finds time to meet their students, whom this pleases, and who derives real satisfaction from it.

At the university – a community of scholars and students whose aim is to seek the truth – the mentor plays a special role, since recognition and the university's position in academic circles depend upon the results of his/her work. And although distinguished scholars can be met at any university, only a few enjoy a mentor's authority. Many academic luminaries do not create schools and leave no successors because they give their students no opportunity to choose their own path in learning, nor allow them to develop and become independent ("to free themselves"); academic progress occurs only when students are able to surpass their mentors.

Tourism researchers, if they are to be treated on an equal footing with representatives of other studies, and if they are bent on becoming full-fledged members of the academic community, must recognize and comply with the standards prevailing in each field. The fact that tourism studies are still in their initial stage of development makes academics even more committed to work hard, and to achieve a mentor status requires meeting extra conditions. In addition to the above-mentioned attributes of mastery in science, tourism researchers must be convinced of the importance and value of their work, whose field of research (tourism) is still regarded as "exotic." They therefore need to prove that their work is innovative and relevant to the picture of the world created by the other sciences. Practical knowledge of the research subject is equally important. Reflections on tourism made by those who have never travelled are like blind man's treatise on colors.

Finally, one must unfortunately note that the erosion of the scholarly ethos occurring in Poland and the accompanying collapse of academic prestige is not conducive to the emergence of an academic elite. In tourism, which still has a shortage of professors, though there are plenty of additional employment opportunities, the phenomenon of multi-job employment is almost universal. This has a negative impact on the level and efficiency of academic work, and some busy scientists no longer remember what was published and where, while they know how much they earn perfectly well.

Arch G. Woodside:

The Role of Masters in Contemporary Science: The Case of Tourism Research

Bill Gates got to do real time programming as an eighth grader in 1968. Till the end of high school, Gates got an extraordinary opportunity to learn computer programming. And by the time Gates dropped out of Harvard to start Microsoft, he had been programming practically non-stop for seven consecutive years. He had logged in more than 10,000 hours, the threshold widely considered as the point at which people become real experts. Malcolm Gladwell (2008) quotes Gates, "I had a better exposure to software development at a young age than I think anyone did in that period of time and all because of an incredibly lucky series of events" (Gladwell and Lane 2008).

"Mastery" implies enacting a high score in "thinking•behavior" resulting in frequent high performance outcomes. The expression, "thinking•behavior" is to indicate a causal recipe that includes the presence of both highly insightful thinking and exceptional displays of skills (e.g., written reports, painting, dancing, and acting) are necessary for frequent high performance. The mid-level dot (•) represents "and" in Boolean algebra (Ragin 2008). For master scholar designation, high values in both thinking (e.g., a 1.00 score and writing (e.g., 0.95 score) are necessary; consequently, thinking•writing equals 0.95—the lower of the two individual scores is the combination score for thinking•writing; see Ragin (2008) for a valuable discussion of this conjunctive scoring system.

An early draft of this introduction used "consistently" rather than "frequent" in the first sentence of the previous paragraph. However, performances by masters sometimes result in poor outcomes; for example, Babe Ruth may be the ultimate homerun master baseball player but frequently lead baseball players in strikeouts as well as homeruns.

Questions about master scholars worth asking include the following issues. How does a person become a master scholar? What do masters perceive, think about, and do while working as well as observing other work? What do master scholars recommend to novices to transform themselves into master scholars?

How does a person become a master scholar?

Reading insightful literature on achieving success and thinking insightfully is an important step in becoming a master scholar. Gladwell (2008) instructs that a causal recipe for frequent success includes the following causal

recipe: 10,000 hours of training ● talent ● culture-context-luck. These three major ingredients are sufficient to become a master scholar—other paths to master scholarship may be possible. Figure 1 illustrates the statement that favorable scoring for training, talent, and culture conjunctively is sufficient for high mastery.
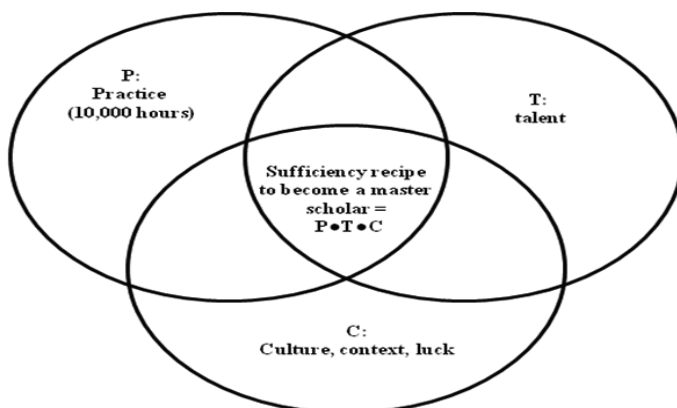

Figure 1. A Causal Recipe for Becoming a Master Scholar

The 10,000 hours in training, practicing, evaluating, and revising usually takes ten-to-twenty years to complete. Mozart completed his 10,000 hours before his 17th birthday; most master scholars today complete their 10,000 hours of training sometime between their 25th and 40th birthdays. Completing the necessary 10,000 hours later in life is possible as well.

Certainly some moderate-to-high level of talent is necessary but not sufficient to become a master scholar. Processes in recognizing exceptionally high talent in oneself and others is a skill that needs greater attention in behavioral science.

Culture-context-luck is more that a catchall antecedent condition; nearly all persons born in North Korea during 1940-2011 and nearly all females growingup in Saudi Arabia suffer from having low scores on this condition for nurturing mastery in scholarship. For novice scholars growing-up in cultures hostile to their scholarly development, moving to Canada, New Zealand, South Korea, or other cultural environments that nurtures scholarship is one strategy that may be necessary though not sufficient to accomplish.

What do masters perceive, think about, and do while working as well as observing other work?

Reading Weick's [1995] *Sensemaking in Organizations* is a useful starting place for learning how master scholars think and act. Reading several papers in the body of work of Donald T. Campbell is another useful place to

begin reading on the thinking by master scholars. More than 11,000 citations reference the brief (84 pages) book by Campbell and Stanley (1963) *Experimental and Quasi-Experimental Designs for Research* – 11,000 citations to one article or book is an exceptionally high number and indicates that the reference is very useful reading.

What do master scholars recommend to novices to transform themselves into master scholars?

Identify a master scholar. Write to the master scholar that you identify and ask for the opportunity to visit her or him – attend lectures given by the master scholar and ask to study for two weeks to two months with the master scholar. Read the best work written by the master scholar. Plan a study with a master scholar; analyze data with her or him; write a jointly-authored paper with a master scholar.

Much, not all, of my best work appears in *Case Study Research: Theory, Methods and Practice* – a book published in 2010. The field experiments and quasi-experiments that I have co-authored I count as my very best work, for example, Wilcox and Woodside (2011), Woodside and Davenport (1976), Woodside and Waddle (1975), and Woodside, Trappey, and MacDonald (1997). Tourism marketing scholars might refer to Woodside, Hsu, and Marshall (2011) for a study on cultural consequences on behavior – a study that illustrates my best work.

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