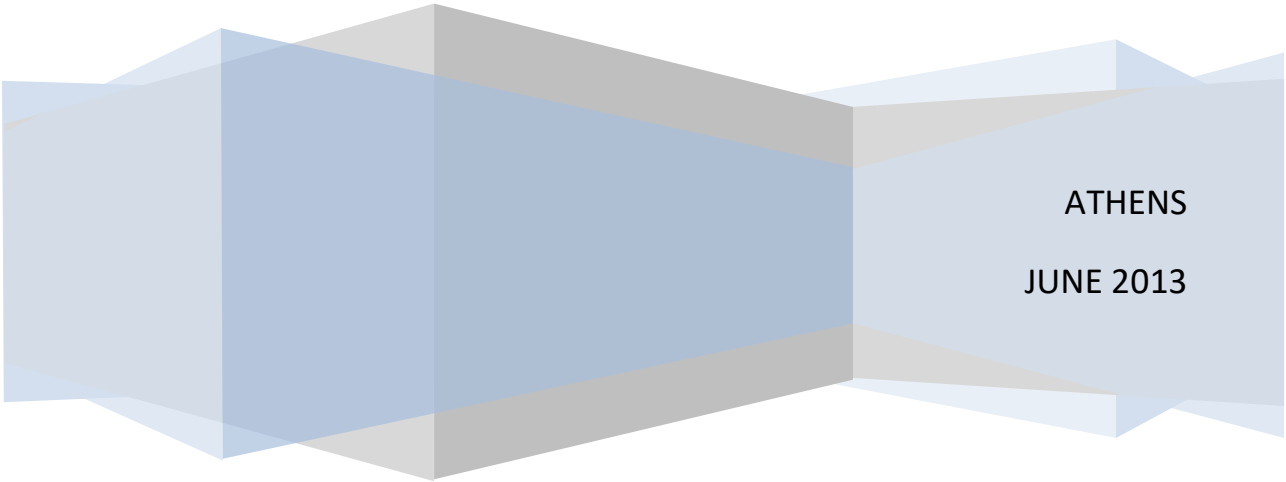


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INTRODUCTION

Science is the knowledge of the existing, which systematically totally covers a sector of issues. Science is one and its purpose is the understanding of all phenomena. Due to human's incapability of mental controlling the whole of universal rules, science is divided to partial "sciences" and each one covers its objective field.

The science of tourism can be divided in two parts. The sciences of understanding the tourism phenomenon and the sciences of the enterprises of hospitality and their management.

Dealing with sciences leads to complete studies whose purpose is the understanding of the reality. These studies are set to be published in refereed scientific journals. Their publication is judged for being original, complete and correct, by members of the academic community. Then, these publications are considered as valid and can be used by other researchers for the spread of knowledge.

Aim of the magazine is the spread of knowledge related to the scientific fields of tourism. In Tourism Issues there are being published original articles and obligatorily new researches. The writing language can be Greek , English , French or German. The scripts will be evaluated by three - membered scientific committee whose members have deep knowledge of the specific fields.

Laloumis Dimitris

WRITING GUIDELINES

In “Journal of Tourism Research” can be published original articles and research studies dealing with tourism topics. The articles and the studies should have never been published before.

Every scientific paper should not exceed a maximum of 8000 words and should be sent in electronic form at info@dratte.gr.

The paper can be written in Greek, English, French or German.

Papers should be typewritten in black, double-spaced on A4 or US letter sized white paper and printed on one side of the paper only, with 1 ½ inch margins on all four sides, using 10 pts Arial characters. Pages should be numbered consecutively.

The first page of the paper should include in the following order: paper title, author's name and surname, affiliation, postal address, telephone and fax numbers, email address, acknowledgements. In the case of co-authors, their full details should also appear (all correspondence will be sent to the first named author). Also include an abstract of 200-250 words, and up to five keywords.

The second page should contain the title of the paper, an abstract of 200-250 words, and up to five keywords. Do *not* include the author(s) details in this page.

Subsequent pages: main body of text; list of references; appendices; endnotes (endnotes should be kept to a minimum).

Every paper should be accompanied by a 180-word abstract. The text of the abstract is not allowed to be part of the paper. Also, the author should propose 4 key words associated with the main fields dealt with in the paper. The aforementioned (name, title, abstract and key words) should be given in English and Greek, as well as in the language of composition in case this is French or German.

Tables, figures and illustrations should be referred to and included in the text, in gray tint. Each table, figure and illustration should be numbered consecutively (in Arabic numbers) and titled. Tables, figures and illustrations should not exceed one page and should be kept to a minimum.

The text should be organized under appropriate section headings. Section headings should be marked as follows: primary headings should be typed in upper case and bold (e.g. **INTRODUCTION**); subsection headings should be in upper and lower case and bold (e.g. **Tourism Planning**).

Quotations should be taken accurately from the original source. Alterations to quotations should be noted. Quotation marks (“ ”) should be used to denote direct quotes. Inverted commas (‘ ’) are to be used to denote a quote within a quotation.

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Every paper will be examined by a three-member scientific committee. The committee's members cover cognitive fields relevant to the papers' topics and receive the papers with the author's/s' name undisclosed. The judging process will be completed with author's anonymity throughout. The judges will propose to the editorial committee the acceptance or the rejection of a paper to be published or the possibility of publishing an article after corrections suggested by the judging committee.

After the papers' judgement, the authors will be notified, either the judgement has been positive or not. The approved papers will be published according to priority of chronological order.

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ACCESSIBLE TOURISM IN THE ITALIAN DESTINATION

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ABSTRACT

The aim of the study is to investigate the advantages and the obstacles relating to accessible tourism. Disability is a phenomenon that receives a growing academic and government attention for a number of demographic and social factors. The number of people with disabilities is expected to increase. Accessible tourism represents a challenge and an opportunity to organizations and destinations to combine tourism quality and growth with social justice.

This study reviews the literature on the main constraints to tourism for persons with disabilities and on patterns of accessible tourism. With regard to this aspect, a specific focus on the “state-of-the-art” of the Italian destination is made. The study documents disability tourism policy and provides a picture of the perception of the tourist industry in serving tourists with disabilities. The survey is enriched by the analysis of a successful Italian case, aiming at evaluating best practices worthy of being replicated and emulated everywhere. The history of the social cooperative “Independent L” well embodies the new cultural lens through which to view tourism from a disability perspective.

Results of research suggest that tourism accessibility is not only a goal to be achieved through measures of an architectural nature, but first and foremost is a civil, social and cultural goal. Providing opportunities for tourism in full accessibility is not only a correct

action from the point of view of universal principles enshrined in the UN Convention, but it is above all an intelligent and forward-looking strategy, full of advantages, including economic benefits.

The research underlines the urgent need for education and training on tourism accessibility, since knowledge is the most efficacious means of changing attitudes towards people with disabilities, so that equal dignity and opportunity among citizens are guaranteed.

Key Words: Accessible tourism, Best practice, Italy, Persons with disabilities

INTRODUCTION

The purpose of this paper is to provide a contribution to the development of inclusive practices in the tourism field, by explaining why and how a much more detailed understanding and catering to the needs expressed by people with disability (PwD) are indispensable.

Despite the rising number of PwD, Destination Management Organisations fail to adequately address the needs of stakeholders with more limited abilities.

Many people with disabilities would like to visit places or destinations with specific objectives: many do but then are disappointed by the difficulties encountered, the low accessibility and usability experience, while others, informed and documented, give up and change the destination of their travel to other destinations.

To meet the demands of PwD involves financial effort, but the costs of compliance associated with accessible tourism criteria are small in comparison to the potential and remarkable benefits gained.

Accessible tourism offers an opportunity for organizations and destinations to gain a competitive advantage, in full respect of sustainable tourism. "Sustainable tourism" has been defined as tourism based on the principles of sustainable development; it is a form of tourism "that takes account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities" (United Nations Environment Programme & United Nations World Tourism Organization, 2005, p. 12). Sustainable tourism encompasses the economic, social and environmental dimensions of tourism development. Accessible tourism is as yet a neglected and underestimated area of sustainable tourism (Darcy et al., 2010).

In order to identify and explore the requirements of accessible tourism and their subsequent effectiveness, a qualitative, conceptual and empirical approach is employed. First of all a brief conceptual and terminological framework about disability and accessibility is provided, without omitting some worrying figures. To highlight crucial issues and challenges for the tourist industry, the literature is analyzed, selecting those researches more attentive to identifying the main issues of accessibility. The Italian situation with regard to accessible tourism is then described. For a mature destination like Italy, the real challenge will be to transform the culture of accessibility in a point of strength, in an asset, and in an item of excellence to be competitive and really welcoming. Finally the paper presents an interesting case of Italian best practice with regard to inclusive tourism. The business case intends to show that it is possible to create economic value (doing business), with the option to also create social value (doing good).

In summary, the study has the potential to contribute to enhancing awareness of importance and benefits of accessible tourism.

CONCEPTUAL AND TERMINOLOGICAL FRAMEWORK

First of all, it behoves to remember the right meaning of disability, as conceptualized by the World Health Organization (WHO) according to the *International Classification of Functioning, Disability and Health* (ICF). The WHO (2001) defines disability as “the outcome or result of a complex relationship between an individual’s health condition and personal factors, and of the external factors that represent the circumstances in which the individual lives”. In accordance with the WHO definition, article 1 of the Convention on the Rights of Persons with Disabilities (UN, 2006) specifies that “persons with disabilities include those who have long-term physical, mental, intellectual or sensory impairments which in interaction with various barriers may hinder their full and effective participation in society on an equal basis with others”. Both international organizations (the WHO and the UN) interpret the disability as a special “relationship” between a “health condition” (disorder or disease) and “the environment” (in the broad sense). Corollary to this “relative” notion of disability is the affirmation of a much more operational model, since the room for manoeuvre for qualitatively and quantitatively reducing the cases of disability increases greatly. In fact, by interfering on “environment”, that is, on one of the two terms of the relationship from which disability arises, it is possible to remove or alleviate many causes of the disability itself (Angeloni, 2011).

A person’s environment has a huge impact on the experience and extent of disability. A deaf individual without a sign language interpreter, or a wheelchair user in a building without an accessible bathroom or elevator, or a blind person using a computer without screen-reading software are all examples of the possible negative impact of the

environment. Inaccessible environments create disability by creating barriers to participation and inclusion.

Therefore, as argued by Barnes (1996, p. 43), the exclusion and the segregation of people with impairments from participation in mainstream activities are not a result of the person's impairment but a function of the disabling social environments and prevailing "hostile social attitudes".

So, it would be more correct to speak about "disabling environments" rather than about persons with disabilities.

The way that disability is conceptualized and the consequent attitudes have a profound effect on society and people with disabilities, because these factors influence the level of accessibility.

"Accessibility" is a term that has a common meaning as well as specific meanings in different contexts. According to the everyday meaning (see *Oxford Popular Dictionary and Thesaurus*, 1998) the adjective "accessible" is synonymous to "approachable, at hand, attainable, available, close, convenient, handy, and within reach". In its specific meaning useful for the theme here treated, "accessibility is a relative concept, implying that accessibility problems should be expressed as a person-environment relationship" (Iwarsson & Stahl, 2003, p. 61). A word often used in parallel to accessibility is "usability", a concept implying "that a person should be able to use, i.e., to move around, be in and use, the environment on equal terms with other citizens. ... Usability is mainly subjective in nature, taking into account user evaluations and subjective expressions of the degree of usability. Usability is a measure of effectiveness, efficiency and satisfaction" (Iwarsson & Stahl, 2003, p. 62). Another common term is "universal design", synonymous to "design for all". Generally, "while accessibility and usability are usually used to determine the observed performance, with usability being more centered on individual interpretation, universal design is highlighted as a more process-oriented approach instead of a focus on results. At its core, universal design addresses the inclusion of the entire population, incorporates aspects of accessibility and usability from the beginning and represents a less stigmatizing concept" (Eichhorn & Buhalis, 2011, pp. 47-48).

Disabling conditions arise from a variety of impairments, among which the most evident types are physical, sensory, cognitive, and communication impairments. However, disabling conditions also arise from less evident impairments (or hidden health problems), like heart disease or low blood pressure. For tourists with disabilities the factors that are the most significant for accessibility vary according to the kind of disabilities (Israeli, 2002).

Documenting the actual number of people with disabilities is problematic. However, according to the first *World Report On Disability*, produced by WHO (2011) in partnership with the World Bank, over a billion people, or about 15% of the world's population, were estimated to be living with disability. This percentage is higher than WHO estimates from

the 1970s, which suggested a global prevalence of around 10%. The most recent figures show therefore a phenomenon which is certainly not marginal, and growing.

The number of people with disabilities is expected to increase. This trend on the one hand is the result of increasing life-span due to the progresses of medicine and medical technology that reduce the mortality rate, but also increase the number of people able to live with chronic diseases. On the other hand the population with disabilities "is increasing given the greater vulnerability of modern daily life to various dangers such as industrial and natural disasters, diseases, traffic accidents, addiction to drugs and/or alcohol, violence, and pollution" (Lee et al., 2012, p. 569).

Therefore, it would be a mistake to consider accessible tourism as a niche market. Older people, who increasingly want (and are able) to travel, "will soon make up 25% of the European population. Added to this are around 50 million people with disabilities in Europe who wish to enjoy holidays with their family and friends. Thus, it is estimated that as many as 130 million people in Europe alone will benefit from improved access to travel and tourism services. Making tourism accessible for all is a rational response to a foreseeable demographic trend, and a massive economic opportunity for the tourism sector" (Ambrose, 2012, p. 20). As a consequence, the real market of accessible tourism is far from modest.

In addition, it should not be forgotten that PwD often travel with others, that is they are accompanied by someone or even by their all family (Huh & Singh, 2007; Jo et al., 2004).

Therefore, the tourism market must be better understood including a broader and more general world of needs, taking into account not only the people who have evident disabilities (such as a motor, sensory, cognitive, or health problems), but, for example, also people who have eating difficulties such as in celiac disease or intolerance to certain foods, or who must follow a low-salt or other diet. Then there are the people who are "tired", due to illness or age or stress or allergies or depression and, besides the elderly, there are the children, the mothers pushing strollers, the pregnant women and much more.

The final satisfaction of these important customers depends highly on the ability of organisations to offer services that are personalized and disability tailor-made.

If tourism requires hospitality, intended as a privileged way of interpersonal meeting marked by the welcoming attitude towards the other (dos Santos & de Carvalho, 2012), then inaccessible tourism is almost an oxymoron.

LITERATURE REVIEW

Given the significant and growing size of PwD, for the last three decades tourism researchers are increasingly turning their attention to the themes of accessibility and mobility for all.

Reasons of economic, ethical and legal order explain the interest of the scientific community in accessible tourism. From the economic point of view, it is evident that it is advantageous to serve tourists with disability, transforming a potential demand in an effective demand. From the ethical point of view, a greater awareness of human needs has allowed the consideration of the tourist experience as an issue of equity and social justice. As consequence of the last point, more and more laws and codes of practice for different sectors are being drawn up in order to ensure the respect of the right to a tourism experience, in the form of accessible tourism.

“Accessible tourism is a form of tourism that involves collaborative processes between stakeholders that enables people with access requirements, including mobility, vision, hearing and cognitive dimension of access, to function independently and with equity and dignity through the delivery of universally designed tourism products, services and environments. This definition adopts a whole of life approach where people through their lifespan benefit from accessible tourism provision. These include people with permanent and temporary disabilities, seniors, obese, families with young children and those working in safer and more socially sustainable designed environments” (Darcy & Buhalis, 2011, pp. 10-11).

Accessibility meets the needs of people with disabilities, but also of the elderly population that often has restrictions in movement, hearing capacity, eyesight, balance, memory and ability.

Only a wider consideration of constraints may lead to a better understanding of tourist motivation, decision-making and destination image (Darcy, 2010; Jenkins, 1999; Woodside & Lysonski, 1989; Yau et al., 2004).

Typically tourism participation of PwD runs up against a “plethora of barriers”, among which: a lack of information on accessibility and accessible facilities; a difficulty in finding accommodation which is really and totally accessible (because “accessible” is not always accessible, especially when it comes to hotels); a difficulty in booking accessible accommodation even when it did exist; a lack of carers or additional costs for care givers; site inaccessibility and scant information about accessible sites; economic constraints. The last point stresses that, for some people with disabilities, holidays are not possible because of financial restrictions. Financial restrictions “are clearly associated with disabilities in that these restrict access to the world of work” (Shaw & Coles, 2004, p. 402).

In addition, for individuals with disabilities, negative attitudes are the hardest barrier to overcome (Schleien et al., 1997). Several studies revealed that for PwD non-physical elements of the tourism environment, such as staff attitudes towards disability as well as limited opportunity for interaction with other people, were major constraints in achieving a full tourism experience. This thought is shared by some authors, who point out that “all sectors in the tourism system need to work towards dismantling negative attitudes that are a major barrier to tourism participation for individuals with a disability” (Eichhorn & Buhalis, 2011, p. 50).

Accessible tourism means to remove these concerns and break down barriers to the full tourism experience.

Many researchers have investigated and well-documented problems that PwD encounter with the tourism experience, providing some classification or categorization of types of constraints.

Smith (1987) provided the first examination and categorisation of barriers to leisure-travel for people with disabilities. He identified three dimensions of constraints:

- *intrinsic* barriers, resulting primarily from the tourist's own levels of cognitive, physical, and psychological function;
- *environmental* barriers, consisting of externally imposed limitations and including attitudinal constraints, architectural constraints, ecological constraints, transportation constraints, rules and regulations constraints;
- *interactive* barriers, resulting from the reciprocal interaction between the tourist and the immediate milieu, with focus on interaction of the host and the guest and possible communication concerns.

Crawford et al. (1991) examined a “hierarchical” order of three constraints that influence leisure participation or non participation: *intrapersonal* constraints, followed by *interpersonal* constraints, and finally the *structural* constraints. *Intrapersonal* constraints refer to psychological conditions that are internal to the individual such as personality factors, attitudes, or more temporary psychological conditions such as depression or mood. *Interpersonal* constraints regard those constraints that arise out of interaction with others such as family members, friends, co-workers and neighbours. *Structural* constraints include such factors as the lack of opportunities or the cost of activities that result from external conditions in the environment. According to the model of Crawford et al., *intrapersonal* constraints that affect leisure preferences occur first. Right after intrapersonal constraints, *interpersonal* constraints take place, which influence interpersonal compatibility. Finally, participation or non-participation is dependent on *structural* constraints. The model elaborated by Crawford et al. was later tested, revised and modified by other researchers.

Turco et al. (1998) identified constraints for PwD within four major tourism sectors and distinguished barriers concerning *attractions* (e.g., site inaccessibility), *information* (e.g., unreliable and inaccurate information sources about a destination and its accessibility), *transport* (e.g., difficulty in transferring between flights, inaccessibility of airplane restrooms), and *accommodation* (e.g., inaccessible rooms and bathrooms, restrictive appliances such as lamps and TVs, and front-desk counters that were too high).

McKercher et al. (2003) identified a number of exogenous obstacles that may inhibit travel, limit options or reduce satisfaction. Such obstacles include:

- *architectural* barriers, such as steps, inaccessible washrooms, inaccessible hotel accommodations, etc.;
- *ecological* barriers, such as uneven footpaths, tree roots and other exterior obstacles;
- *transportation* barriers, especially of the local transport variety including cars, buses and taxicabs;
- *legal* barriers, when rules or regulations prohibit people with disabilities from bringing needed equipment with them;
- *communication* difficulties, both in the individual's home and at destination;
- *attitude* barriers, due to negative attitudes from service providers;
- *information* barriers, due to inaccuracy of data about site accessibility.

McKercher et al. (2003) analyzed the constraints encountered by people with disabilities when they use travel agents. In particular, travel agents result inadequate to satisfy the needs of PwD for *attitudinal* reason (unawareness of the needs of PwD) and for *structural* reasons (inability to provide products that suit clients' needs and a preference to sell the standardized tourism package). The paradox is that travel agencies, instead of representing a facilitator, end up being another barrier for PwD. Also Takeda & Card (2002) recognized an indispensable role and significant benefits to travel agencies and tour operators that specialize in organizing package tours for clients with disabilities.

Other authors focused their analysis on travel-related constraints (Cavinato & Cuckovich, 1992; Chang & Chen, 2011, 2012; Poria et al., 2010). Other researchers studied in depth the experience linked to the visit of museums (Diamond, 1999; Poria et al., 2009). Others analyzed the accessibility of accommodation facilities (Darcy, 2010; Darcy & Pegg, 2011; Ozturk et al., 2008; Papamichail, 2012; Peniston, 1996).

According to Buhalis & Michopoulou (2011) the disabled/ageing population market has three basic requirements, namely:

- accessibility of physical/built environment;

- information regarding accessibility;
- accessible information online.

PwD must resolve a number of architectonical obstacles that may inhibit travel, limit options or reduce satisfaction. Accessibility involves a range of physical barriers, both in public and private spaces.

PwD “need to identify information on accessibility to scenic spots, toilets, hotel accommodation, and transportation, as well as availability of assistance and presence of travel partners” (Yau et al., 2004, p. 954).

Information and Communication Technologies (ICTs) have increased the frequency of tourist travel from the major generating regions. But ICTs are an even more crucial tool for PwD, who often use technology to compensate for the areas of functioning that they are lacking. It follows that tourists with disabilities provide the important function of stimulus, pushing organizations to be at the forefront in terms of ICTs and assistive technologies (Pühretmair & Buhalis, 2008).

However technology, depending on its configuration, can be not only a facilitator, but a barrier instead, with the consequence that technological constraints become another, and more modern, barrier for PwD. Unfortunately, web surfing is often still a barrier for people with disabilities (Michopoulou et al., 2007). “Examples of the physical barriers include: low vision users will need large text or spatial adjustment, blind people will require screen readers, color-blind users will need adequate contrast of text and background colors, and deaf people should have visual displays rather than pure audio presentations” (Buhalis & Law, 2008, p. 616). Nevertheless, technology, if well designed, can be a useful facilitator. The compliance with the standards defined by World Wide Web Consortium (W3C) and the assistive technologies allow PwD to access web information. Therefore, tourism web planners should take account of the needs of every group of users, so as to design the websites to address inclusion.

The quality of information provided can also be improved by Virtual Reality (VR), that can be defined as “the use of a computer-generated 3D environment – called a ‘virtual environment’ (VE) – that one can navigate and possibly interact with, resulting in real-time simulation of one or more of the user’s five senses” (Guttentag, 2010, p. 638). VR’s capacity to facilitate access to sites can benefit everyone, but this capacity is particularly beneficial for individuals with disabilities. For example, when physical access barriers cannot be easily eliminated due to large costs or conservation requirements (such as in historical heritage sites), visitors with disabilities can enjoy alternative forms of access provided by VR.

Obviously, the final purpose must be to provide an overall experience which is satisfying to the visitor with disabilities. As argued by Ambrose et al. (2012), all aspects of the accessible tourism value chain must be considered to well cater for PwD’s needs because

only a *comprehensive accessible experience* increases loyalty of visitors and profitability of service providers. "Accessible hotels, restaurants, museums and other visitors attractions must not be isolated 'oases of accessibility' within otherwise inaccessible landscapes; they must be physically joined up by accessible routes and transport systems. Moreover, destination management organizations must advertise the existence of accessible facilities and attractions through regular marketing channels in order to attract customers" (Ambrose et al., 2012, p. 6).

The true genesis of inaccessible and hostile tourism is probably to be found in a cultural issue: "the service providers in the tourism industry are given very little education and training concerning legislation, access provision, and service related to people with disabilities" (Daruwalla & Darcy, 2005, p. 550).

ITALIAN POLICY ON ACCESSIBLE TOURISM

Generally, in Italy accessible tourism is being facilitated by a good legislation. Accessible tourism is a topic which has received increasing attention, above all since the late 1990s. Focusing the analysis on the most recent period, some important steps are to be noted.

In 2009 Italy ratified the Convention on the Rights of Persons with Disabilities (CRPD) and its Optional Protocol, adopted by the UN General Assembly on December 13th 2006.

To guarantee the implementation of the UN CRPD, a national law (article 3 of Law of 2009, no. 18) established the National Observatory on the Condition of Persons with Disabilities. The Observatory is a consulting body that provides technical and scientific support for the elaboration of National policies in the field of disability.

In October 2009 the Minister for Tourism created the "Accessible Tourism" ministerial Committee. This Committee drafted the "Manifesto for the Promotion of Accessible Tourism". The Manifesto contains ten fundamental principles, as illustrated by Figure 1. In March 2011 European Network for Accessible Tourism (ENAT) undersigned the Manifesto, committing to promote its contents in all 27 EU Nations.

Moreover, on September 27th 2012, Italy signed the adoption of the Global Code of Ethics for Tourism (Angeloni, 2012).

Also in 2012 a Ministerial Decree established a Committee for the Promotion and Development of Accessible Tourism. In 2013 the Prime Minister's Office & Mission Office for Enhancing Italy's Image (PMO et al.) elaborated and published the first "White Paper on Tourism for All in Italy", entitled "Make it accessible".

The White Paper is a novelty to Italy and contains 360 best practices and projects related to accessible tourism, which show that Italy has been promoted among the destinations available worldwide. Below a summary of this White Paper is provided.

To quantify Italian people with disabilities, the White Paper uses the main source of data, represented by the study “Social inclusion of people suffering from limitations to personal independence”, published by the Italian National Institute of Statistics in December 2012. According to this study, in 2011 the number of persons aged 11-87 years with functional limitations is 3,947 thousands: more precisely, 1,867 thousands are persons with “slight” functional limitations while the number of persons with “serious” functional limitations is 2,080 thousands. According to the same survey, over one and a half million Italian people (45% of the total of those aged between 15 and 87 with functional limitations) find it difficult to go on holiday due to health-related problems.

The White Paper (PMO et al., 2013, p. 40) reports that over 80% of Italians considered accessibility very important to modernising the services offered by the tourism sector. Moreover 12.8% of the Italian population declared that they have been in a situation, at least once, where they had special needs; they also declared that the special needs were catered for in 80% of such cases.

In this regard positive judgements also come from the data processed in 2010 by the TTG (Travel Trade Group) Italia's Buyer Observatory, based on interviews with 600 foreign tour operators. These operators, who are “selling” Italy all over the world, believe that the country could improve, but 77% of the sample considers that Italy is an “accessible” destination. The most urgent improvements should be made, according to 54% of tour operators, to railway stations, which remain highly inaccessible, often due to structural constraints, but also due to the lack – as almost 80% of respondents stated – of adequate support and information services to aid communication with visitors. The opinion about accessibility is only slightly better on the subject of hotels, held to be inadequate by 46% of those interviewed, and restaurants, which in 38% of cases are deemed not capable of adequately receiving persons with disabilities.

Another important aspect highlighted by the survey is the sensitivity and training of staff. Clients with special needs do not feel understood in Italy, especially if the difficulty is a food-related problem. According to feedback received by tour organisers, these problems are underestimated by hotel and restaurant staff, unable to offer specific menus and food to persons suffering from coeliac disease, or who are lactose intolerant, or who have special dietary needs.

The same foreign tour operators also report that Italy falls short in providing training for establishing relations with clients suffering from mental illnesses, or with blind or deaf clients. Operators believe that personnel in Italy are not adequately trained to provide information to travellers suffering from renal insufficiency (who need to know where haemodialysis centres are located locally), diabetes or oncological diseases (who might benefit from the positive effects, including psychological effects, of the holiday in order to carry on with their treatment).

Another important survey referred by the White Paper (PMO et al., 2013, p. 44) regards studies conducted in 2009. According to these studies, almost 52% of accommodation structures, as a national average, paid particular attention to the needs of guests having disabilities and special needs. Table 1 provides a detail of these accommodation structures with awareness of PwD needs, distinguishing them by product area. It easy to note that the mountain area had the greatest difficulty in approaching the question of accessibility, due to inherent structural difficulties and the nature of its accommodation structures.

Table 1 Accommodation structures with awareness of PwD needs, by product area (2009 data)

	Percentage
Cities of historical and artistic interest	51.2
Mountain	48.3
Spa	58.8
Lakeside	56.3
Seaside	52.7
Country	56.5
Other localities	52.0
<i>National average</i>	<i>51.9</i>

Source: PMO et al. (2013), White Paper on Tourism for All in Italy

It is interesting to investigate the breakdown of the same accommodation structures by type of accommodation. Table 2 below shows the percentage values.

Table 2 Accommodation structures with awareness of PwD needs, by accommodation type (2009 data)

	Percentage
Hotel	57.0
Holiday village	77.2
Holiday farm	58.3
Campsite	83.0
B&B	25.5
Holiday home	57.2
Youth hostel	80.1
Alpine refuge	24.5
Other guest accommodation	43.6
<i>National average</i>	<i>51.9</i>

Source: PMO et al. (2013), White Paper on Tourism for All in Italy

Table 2 shows that 57% (national average) of hotels were “heedful” to accessibility. Special care was also taken by hostels (80%), the highest expression of “popular” tourist accommodation. However, most care (83%) was expressed by campsites, a type of enterprise in which, due mainly to the presence of camper vans and caravans, tourists with special needs enjoy particular flexibility.

The White Paper discusses another and more detailed survey on accommodation structures, conducted in 2012, in order to examine the various aspects of attention paid to the issues of accessible tourism. The results are very interesting, because they give a measure of the relationship between “hard” factors and “soft” attitudes (PMO et al., 2013, p. 47).

In particular, this survey questioned Italian enterprises about 12 possible modes of structural products and services for accessible tourism. Table 3 lists in decreasing order the most common services provided by enterprises to meet PwD needs.

Table 3 Structural services for accessible tourism (2012 data)

	Percentage
Bathrooms/bedrooms of adequate size/accessories	43.8
bEasy access to structure/accessible entrance	43.3
Easy access to bedrooms	34.4
Flexible food/menu based on guests' needs	24.0
Adequately sized lift	17.5
Staff trained to meet specific needs	16.0
Offered services reported in promotional materials	14.3
Lift with acoustic signals	11.2
Lift with Braille buttons	8.1
Specific entertainment (activities inside/outside the structure)	7.1
Services provided by associations collaborating with the structure	6.3
Presence of stair lifts	5.9

Source: PMO et al. (2013), White Paper on Tourism for All in Italy

At a national level, the most common service provided is that of bathrooms of adequate size and accessories (almost 44%), followed by easy access to the structure (about 43%). Still on structural aspects, facilitated access to bedrooms is found in 34.4% of structures. In fourth place with 24% there is a "soft" element, namely a flexible choice of food based on guests' needs. Adequacy of lift size is next in the list (17.5%, but lifts with acoustic signals

are present only in 11.2% of cases; lifts with Braille buttons are present only in 8.1% of cases, and the availability of stair lifts or other equipment are present only in 5.9% of cases). Specific staff training ranks in 6th place (16%). The accessible tourism services offered are adequately reported in promotional materials only in 14.3% of cases. Finally, specific entertainments are provided in 7.1% of cases, sometimes with services provided by associations collaborating with the guest accommodation structure (6.3%).

As already explained, the White Paper also collects and analyzes 360 accessible tourism projects (starting from the late 1980s to today).

The selected projects are very different for date of beginning, for size of the territory of implementation (national, regional and provincial scale projects), for type of intervention (publication of guides, training activities, communication tools, removal of architectural barriers, other specialist services), for subjects involved (from institutions to businesses to tourists), for type of disability referred to.

Given its vanguard, the case of *Independent L* organization has been chosen as an example of best practice, worthy of specific analysis, as shown below.

A CASE OF BEST PRACTICE

The project, described here, is as an example of best practice. It was realized by the social cooperative *Independent L* ("L" stands for "Living"), an organization which over the years has created a monitored and evaluated accessibility of touristic facilities in one of the most beautiful Italian regions: South Tyrol.

Independent L was founded in November 1997, by nine people with physical disabilities, all in wheelchairs, aiming at working together, towards the abolition of all discriminatory rules and barriers, the protecting of rights of people with disabilities in order to have equal opportunities and, above all, to have an independent life, characterized by a real autonomy in large and small decisions concerning everyday life.

Currently *Independent L* employs 23 people, 40% with disabilities, and has 22 members (90% with disability). The key projects of *Independent L* are mainly financed by the European Social Fund; the Autonomous Province of Bolzano and various banking institutions also finance some initiatives of the social cooperative, depending on the nature of the projects. *Independent L* also has an in-house Webcenter, a business unit that offers web-based internet solutions regarding accessibility. The services meet also the needs in terms of accessibility by people with sensory, motor and cognitive skills.



Ministero del Turismo

Manifesto for the Promotion of Accessible Tourism

Putting into effect art. 30 of UN Convention concerning the rights of persons with disabilities ratified by
Law no. 18 of 2009

1. People in the most complete meaning of the term, with their specific needs resulting from personal and health conditions (for example: motor, sensory, intellectual disabilities, food intolerances, etc.), are citizens and customers who have the right to autonomously make good use of all the tourist services on offer, being supplied with suitable services with a just quality/price ratio.
2. Accessibility involves the whole tourist service chain, both at national and local level, starting with:
 - a. transport network;
 - b. accommodation capacity;
 - c. restaurants and cafés;
 - d. culture, leisure and sports.
3. Location accessibility shall not be the decisive factor when planning holidays: it should be possible to choose a destination or a tourist facility because it is where we want to go and not because it is the only accessible one.
4. It is necessary to think of accessibility as access to life experiences, that is overcoming the concept of "standard", enhancing the value of the person/customer, who has specific needs.
5. Information about accessibility cannot be reduced to a mere symbol, but has to be objective, detailed and guaranteed, to allow each person to certainly evaluate by himself which tourist facilities and services are able to meet his specific needs.
6. It is necessary to promote positive communication, avoiding the use of discriminating words. It has to be distributed in formats that everybody can use, and through all tourist information and promotion channels.
7. As accessibility does not concern only structural and infrastructural aspects, but also the services offered to tourists, it is necessary to promote quality reception for everybody, that is to encourage a cultural change, that can result in changes in organization and management models, even before structural ones.
8. It is necessary to encourage skill and professional training, based on Universal Design principles and involving the whole tourist and technical professional profile chain: managers, employees, companies, public and private enterprises. It is also necessary to update curricula in all Schools for Tourism, Technical Schools, Universities, Masters and Academic Centres of all grades.
9. Local Authorities, according to their competences and functions, shall implement the accessibility of towns, public buildings and local transports, and shall also plan periodical control and promotion operations for tourist offers for everyone.
10. In order to implement and promote accessible tourism in a system logic, proactive collaboration among tourist Operators, Local Authorities, Public Bodies, Associations of persons with disabilities and social tourism Organizations is encouraged.

Figure 1: Manifesto for the Promotion of Accessible Tourism

The Webcenter realized some important works; the most outstanding websites are:

- 1) South Tyrol for all (www.southtyrolforall.com);
- 2) Municipalities for all (www.comunipertutti.it).

“South Tyrol for all” is a specialised tourism portal that gives everybody the possibility of barrier-free holidays in South Tyrol. This website is a user friendly, extremely lightweight and intuitive search instrument for all those that cannot travel freely, in order to make South Tyrol accessible for people with disabilities, elderly people, families with small children and people with food allergies or intolerances. “Holidays without barriers” is the slogan that characterizes the South Tyrolean site dedicated to people with disabilities.

In its starting phase, the portal, born in 2004, aimed at showing the accessibility of facilities. About 1,600 hotel facilities were evaluated, but at that time only around 300 structures matched the demanded criteria. To increase awareness among operators of tourism industry, *Independent L* distributed 5,000 CDs and 50,000 brochures to national and especially international travel agencies.

In a second step, the analysis of accessibility has also been extended to structures other than accommodations. Therefore, the most interesting aspect of the current portal is the vastness of the reviewed structures (not just hotels). On the portal every structure published, whether hotel, restaurant or tourist attraction, is evaluated in an objective manner, letting the viewer to determine what is really accessible, according to his personal needs and requirements.

The careful attention to detail makes the portal an indispensable means for all those who live in South Tyrol or who intend to spend their holidays here.

“South Tyrol for all” is not just a rich and useful travel portal, but it is also the official information platform for accessible tourism in South Tyrol-Dolomites. This shows that South Tyrol is ever-busy in order to enhance its touristic offer by proposing high quality touristic services. The team of *Independent L* provides accessible tourist information, assistance and advice, in order to help guests to plan their holiday in South Tyrol as comfortable as possible. The touristic offer includes barrier-free accommodations, restaurants, tourist attractions, sports and leisure, transport accessible to all.

Throughout the years (9 up to now) and thanks to the remarkable work of *Independent L* people with disability, who visited and examined the facilities shown on the portal, the information on the website truthfully shows a detailed overview of facilities complete with clear and handy evaluation criteria, that indicate their different degree of accessibility.

The very portal provides detailed information regarding:

- around 350 accommodations;

- 110 restaurants, bars and cafes, bakeries;
- 46 excursions (also described in terms of difficulty);
- 7 natural parks;
- 13 panoramic cableways (more were examined and they will be online in a couple of months);
- 28 train stations;
- 84 cultural spots and entertainment;
- 22 facilities including swimming pools and sports centres.

Each structure shows a detailed and complete description. The single technical files start from the outer area of the single facility and lead to the inside one.

More precisely, the portal indicates in an orderly manner the following aspects:

- the presence of car parks and the presence of reserved car parks specifying the type of paving and the difference in height;
- the distance between the parking and the entrance;
- the entrance and details about the door (if automatic or sliding), the maneuvering space, the type of paving;
- the restaurant area and the bar area specifying the types of doors, the height of the tables and the minimum distance between the various tables, the height of the tables for the buffet and the height of the bar counter, the presence of carpets, the paving type;
- the toilets (port, height and type of WC, height and other characteristics of washbasin), the presence and type of lift (size, type of door, height of buttons, possible presence of the audible warning of arrival at the floor) and other rooms;
- if there are terraces or gardens, their features and how to access them;
- in the case of hotels, the height of the reception desk, the size of the corridors, the characteristics of the rooms (dimensions of the furnishings, the presence of automatic regulators for heating and air conditioning, height of switches and handles), the characteristics in terms of accessibility to other areas (sauna and Turkish bath, solarium, beauty center, wellness, fitness).

The workers steadily and currently engaged in the care of the portal are two.

“South Tyrol for all” offers a comprehensive data base with information. More precisely the portal is very rich in: technical files; photos; detailed descriptions; evaluations, distinguished in “general” and “specific” evaluations.

The “general” evaluation, expressed on each structure by means of a variable number of “smiles”, refers only to the degree of usability by guests with disabilities.

Possible evaluations, in descending order, are as follows:

 (five active smiles) – *excellent accessibility* – accommodation can be used very well in all areas and the furnishings are adapted to the needs of people with disabilities;

 (four active smiles) – *good accessibility* – accommodation can be used well in all areas but some furnishings could be better adapted to the needs of people with disabilities or the wellness area is hard to reach;

 (three active smiles) – *satisfactory accessibility* – accommodation is accessible but the independent utilization is uncomfortable in some important areas;

 (two active smiles) – *limited accessibility* – accommodation has restricted accessibility and the independent utilization of some important areas is very difficult;

 (one active smile) – *only accessible with assistance* – accommodation is accessible only with reservation because the utilization of the services needs the assistance of an accompanying person.

Besides a general evaluation of the accessibility, the portal also provides a “specific” evaluation of the accessibility for individual hotel areas (always using a variable number of “smiles”).

The “South Tyrol for all” portal tries to be objective when evaluating a single facility; however a marginal subjective component remains when the accessibility of a hotel is evaluated, because the needs of PwD can be classified in many different ways. For this reason the portal advises users to look at the many pictures and read the technical files as well, in order to find the facility that fulfils their very needs.

This online service, unique in Europe in terms of content, allows all people with disability (or not) to know the list of accessible places and book the accommodations and other tourist facilities from their home. The uniqueness of this site is given by the large amount of true and complete information collected and displayed. The website is accessible also to people with visual disability.

In addition, today all this rich information is also available in a mobile way, so that tourists and citizens can get real time information at any time and at any place where they are situated. Indeed, from May 2013, “South Tyrol for all” is also available for smartphone and tablet thanks to a mobile application (APP). This new APP, a free download from the Apple Store, was created to facilitate mobility and allows the immediate search of places and

facilities on the basis of geo-referenced location, degree of accessibility and the type of facility or service desired.

But *Independent L* is already thinking to the future. Currently the site is only published in Italian and German, but *Independent L* is presently working on the English version and some new graphic features to improve accessibility services.

CONCLUSIONS

Ability and disability are areas of increasing interest in the tourism services. The tourist industry is frequently portrayed as an industry for the young and super-fit persons and this projection is used to create the image of vibrancy, energy and fun. However, the tourism sector can be more correctly described as one that offers opportunity to all members of a society respecting the whole range of its ability and disability (Baum, 2006).

The differences characterize the human population. Every tourist is different, carrying a unique spectrum of experiences, motivations, needs and desires and, when the tourist is a person with disabilities, *a fortiori* this diversity should be respected and taken into account.

An organization (or a destination) that proves to be capable of meeting the needs of tourists with disabilities is an organization (or a destination) able to meet the needs of all tourists, being committed to meeting the needs of more sophisticated tourists. The literature has well documented the main constraints (or barriers) that preclude or reduce the travel frequency rate or the full enjoyment of the tourism experience. Tourism may and must contribute to the improvement of an individual's physical, psychological and mental health.

Thinking of the environment for the elderly, the person with permanent or temporary disability, the child, the pregnant lady, means to face restrictions, limitations, difficulties that any individual can have or have someday.

In the Italian destination, despite a good general policy framework, accessible tourism is still a strategy achieved by only a few operators and in some parts of the Italian destination. But the presence of some virtuous and successful cases is not sufficient, because only a "seamless" travel experience will attract visitors (Ambrose et al., 2012). The findings indicate that there are still many barriers which restrict the travel frequency of PwD who are willing to undertake a journey in Italy. This implies a significant loss of customers and also of profit, if it is true that in the collective imagination Italy is still considered the most valuable collection of luxury and cultural heritage in the world (FutureBrand, 2012). Tourism websites also show little attention to the market and information needs of travellers with disabilities.

The case of *Independent L* teaches us that it is possible to move on from tourism development to sustainable tourism development without enormous financial and human costs, but only by a good cultural awareness of disability. The auspice is that a successful case such as that of *Independent L* is emulated and repeated, involving and empowering PwD (Darcy, 2006), as *Independent L* did.

In other words, it is hoped that the society at large will be more aware of PwD needs and that the tourism industry will be better able to provide inclusive and barrier-free services tailored to the needs of PwD.

We agree with Daruwalla & Darcy (2005, p. 563), according to who “in industry contexts, it is essential that both business enterprises and educational institutes offering tourism and hospitality programs put disability awareness firmly on the agenda”.

The research findings leave no doubt: educational challenge is the turning point to having a society less inattentive and egoist, and a kind of tourism which is more inclusive and sustainable. Future reflections and actions in the field of accessible tourism can economically and humanly enrich the industry, since inclusive tourism by definition means to pursue the well-being of all.

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***ENHANCING STUDENTS' LEARNING IN
SUSTAINABLE PRACTICES BY INCORPORATING A
TRIPLE BOTTOM LINE APPROACH IN A
RESTAURANT OPERATIONS COURSE***

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Abstract

Sustainability is an increasingly important concept for all hospitality students to understand before entering the workforce. New curriculum employing more sustainable content was introduced at the University of Guelph's School of Hospitality and Tourism Management. Using the school's restaurant, PJ's, which is used as laboratory for course delivery, students were asked to take a triple bottom line approach in its operation. Curriculum

additions required students to calculate nutritional analysis and complete life cycle assessments of menu items. Other sustainable improvement such as composting, the increased purchasing of local food and beverages and waste reduction were also introduced during the course of the academic year. This paper provides a framework for other hospitality institutions to incorporate a triple bottom line approach to operating student run restaurants. The increase of scores for the 'sustainability' related learning objectives show us that the project was successful in introducing students to sustainability topics. With the embedding of new sustainably focused curriculum in a third year restaurant operations course students became more aware of the effect that restaurants have on their environment and in their communities.

Keywords: *Hospitality Education, Sustainability, Restaurant, triple bottom line*

Introduction

PJ's is a full service, student run restaurant in the School of Hospitality and Tourism Management (HTM) at the University of Guelph. The restaurant is used as a laboratory to teach students about the fundamentals of food production and restaurant operations management. New curriculum aimed at introducing sustainability was incorporated into the restaurant operations course taught at PJ's during the 2011/12 academic year. Funded through the University's Learning Enhancement Fund (LEF), this change was implemented to fill a need for more sustainably focused curriculum at HTM. A project team was formed to work on the development of sustainably focused learning modules to be introduced to HTM3090, the restaurant operations course that all HTM students were required to take. The team included two faculty members, the Chef/Instructor of PJ's, a recent graduate of the program and an Undergraduate Research Assistant (URA).

Goals set out for the project were determined through discussions between members of the project team and input from HTM students who had already completed the restaurant operations course. The goals were defined as:

- (1) To complete a review of PJ's current operation in regards to all aspects of environmental, social and economic sustainability.
- (2) To develop new curriculum for HTM3090 that would embed aspects of sustainability and create associated learning outcomes for future students.
- (3) To implement new 'sustainable' practices to transform PJ's into a 'model of sustainability'.

PJ's is open to the public for weekday lunch service eight months a year as well as offering a fine dining experience once a week for three months during the winter semester. The restaurant has had a number of upgrades since it opened in 1974, including a major renovation in 2001. PJ's has historically operated similarly to most restaurants in Canada and few sustainable restaurant practises had been incorporated

prior to the proposal of this project. Indeed, PJ's operated in a conventional manner that focused on "...management functions and the production of food in quantity with an emphasis on principles of food production and service in a commercial setting". (University of Guelph, Undergraduate Calendar, 2011) Its focus has been on teaching students the daily, and mostly economic operating aspects of restaurants including such areas as ordering, food cost, pricing and quality control.

This article presents the results of a curriculum development exercise aimed at incorporating the principles of sustainable development in a restaurant operations course within a hospitality and tourism program. The project team used a 'Triple Bottom Line' approach introducing new learning modules that related to environmental and social aspects of sustainability. This introduced the broad concepts of environmental and social sustainability along with examples of specific initiatives in each area. It was determined that students were already getting a solid 'economic' understanding of how restaurants were operated so no changes were made in this respect.

The literature review reflects the current demand for and issues surrounding increasing sustainable practices within the restaurant industry and higher education curriculum. Replication of this project can be undertaken by following the detailed steps in the methodology and results sections. The achievements and challenges faced throughout the project, as well as future implications are discussed to allow others to consider broader ideas of incorporating sustainability into the curriculum and the restaurant/foodservice industry.

Literature Review

Sustainability

Sustainability has been at the forefront of many corporations' strategic direction for the past thirty years as environmental effects stemming from population growth; increased consumption and industrialization have been realized. In 1987 the World Commission on Environment and Development completed a report for the United Nations entitled "Our Common Future." More commonly referred to as the Brundtland Report, this 'global agenda for change' paved the way for organizations to become more aware of their impact on the environment. Thus began the greening efforts by many organizations working toward a more energy conscious behavior and their implementation of internal procedures to reduce pollution.

The definition that commonly appears in sustainability literature is the joint statement from the International Union for Conservation of Nature (IUCN), the United Nations Environment Programme (UNEP), and the Worldwide Fund for Nature (WWF) whereby, sustainable practises "...improve[e] the quality of human life while living within the carrying capacity of supporting ecosystems" (IUCN/UNEP/WWF, 1991, p.10); further, the Brundtland Commission instructs that sustainability "...meet the needs of the present without compromising the ability of future generations to meet their own needs (United Nations, 2007, p. 2).

Another term developed as a result of the work done by the United Nations is 'triple bottom line'. The initial use of this term is attributed to author John Elkington and was first seen in his book *Cannibals with Forks: the Triple Bottom Line of 21st Century Business*. The term offers an approach that enlists organizations to look beyond the financial bottom line of their business. Companies are asked to consider not only the economic outcomes of their activities but the social and environmental results as well. The term "People, Planet and Profit" is often used interchangeably with the concept of the Triple Bottom Line.

Sustainability and Restaurants

The restaurant industry in Canada has been slow to adopt principals put forth in a triple bottom line approach. Approximately 64% of the Canadian Accommodation and Food Services sector is a small or medium (SME) size business that employs 5 to 75 people (Statistics Canada, 2008). SME's are less likely to implement sustainable practises than their corporate counterparts (Schaper & Carlsen 2004; Revell & Blackburn, 2007; Tilley, 1999). A number of factors contribute to this, including the attitude of owners and employees, the cost of implementing sustainable initiatives, a lack of financial incentives, and a lack of government or regulatory standards (Chou, Chen & Wang, 2012). While SMEs may not have the marketing budget of larger corporations a communication strategy identifying their environmentally friendly practices can increase patronage (Hu et al., 2010). The sustainability of the hospitality and tourism industry is dependent upon managers who are willing to adopt and promote a triple bottom line approach as part of their management strategy. Education and training is needed in order to improve sustainable business practices in this sector.

While the hotel and tourism sectors have made some progress adopting sustainable practises— this cannot be said in the restaurant sector (Tseng, 2010). Myung, McLaren & Li (2012) reviewed the environmental research literature in the hospitality industry published between 2000 and 2010. Of the 58 articles, only 6 articles focused on the restaurant sector. It would seem that restaurant managers have fewer examples to follow should they want to develop practices needed to create a more sustainable future.

Menu content analysis and the labelling of menu items has become an issue of social sustainability for Canadian restaurants to consider. With increasing levels of obesity, type-two diabetes and hypertension in Canada (Health Canada 2012), restaurants are being asked to consider their role and responsibility in regards to this issue. In March 2010, the United States Congress passed a national law requiring chain restaurants with 20 or more outlets to list calories on menus and menu boards. Some studies have shown that consumers underestimate the calories in restaurant items. Menu labelling can help consumers understand what is in the foods they eat and can motivate restaurant owners to change recipes to lower fat and sodium in their offerings. (Roberto et al., 2010) Evidence suggests that menu labelling can decrease the amount of calories purchased per restaurant transaction. (Finkelstien et al., 2011) Students introduced to this concept will be

prepared to deal with a change in consumer demand and increasing regulation in this regard.

Sustainable Curriculum

It is believed education is the greatest hope to creating a sustainable future. Universities and colleges are an integral part of the global economy and prepare professionals who will develop, manage and teach in our public, private and non-governmental institutions. In 2012, over 1.5 million full and part-time students were registered at a Canadian university, and therefore, have a significant impact on the economy (AUCC, 2012). It is essential that undergraduate business programs provide students with opportunities for success in the job market and develop skills to think critically and make decisions that will contribute toward building sustainable commerce. Rethinking and revising curriculum to incorporate sustainable development into educational programs is based on a set of United Nations (1987) objectives and encouraged from industry (Cortese, 2003). As more companies create sustainable products, they are looking to staff their organizations with graduates who understand sustainability principles (Calhoun, 2005). Leaders in a variety of industries are vying for graduates who "understand green" (Calhoun, 2005).

Deale, et al. (2011) found incorporating sustainability into the hospitality curriculum remains an afterthought or an add-on to the curriculum in many courses. When sustainability is included, it is often presented in lecture/discussion (20%), followed by case studies (12%). Continuing to develop pedagogy that takes the educational experience from a theoretical to a practical level will impact the way students are able to implement sustainable hospitality business practices; "Hospitality educators are uniquely positioned to play an important role in forwarding sustainability practices in the hospitality industry" (Deale, et al., 2011, p.40). The context of learning needs to change to make human and environmental interdependencies, values perspectives, and ethics, a central holistic part of teaching in all disciplines, rather than isolating them as a special course (Cortese, 2003; Reid & Petocz, 2006).

Methodology

It was determined that assessing the current state of PJ's environmental, social and economic practices would help provide context for the project team to set goals. Taking a triple bottom line approach, coupled with a review of a number of on-line sustainability tools, the team developed a comprehensive and unique audit form. This form was used as a guideline to evaluate the current state of sustainability at PJ's restaurant. Completion of this form proved beneficial in both educating the project team and

highlighting potential areas of focus. The results of the audit helped produce the prioritized ideas for curriculum change including the nutritional and life cycle analysis of menu items.

In addition to designing new curriculum, the project team met informally, but regularly to look at various initiatives to incorporate other sustainable practices to the daily operations of PJ's. Using the audit results as a guideline the project team identified three areas of potential improvement; food and beverage sourcing, energy consumption, and waste management. Small projects in each area were tested and either adopted or abandoned during the course of the school year.

Curriculum Redesign

Two new learning modules were created for the restaurant operations course: a nutritional analysis of menu items; and a life cycle assessment (LCA) of food. Existing course content was scaled back in order to add the aforementioned modules. Each new module was designed to take the student approximately four hours to complete.

Nutritional analysis.

A redesign of PJ's' menu to include a nutritional analysis of all menu items using ESHA Research's The Food Processor Nutrition and Fitness software (ESHA Research, 2006) was introduced. ESHA Research generates the caloric breakdown of each menu item, itemizing calories from fat, saturated and unsaturated fats amounts, carbohydrate content, protein amounts, and sodium values. The decision to provide the breakdown of nutritional information for PJ's patrons was based on recent research where customers wanted information on fat and calories (Mills and Thomas, 2008) as well as the growing concern of too much sodium in food products (Health Canada, 2012).

By including the nutritional analysis of food items on the PJ's menu, students were forced to consider consumer reaction to such information. This required students to look at menu engineering in a socially conscious way.

Life cycle assessment of food.

In this module, students researched the impact on the environment of food they were using in the creation of their menu. Students choose two ingredients from the menu items they had created—one fruit or vegetable and one meat or dairy item. Students researched and commented on the environmental impact produced by each of their chosen menu items, focusing on production, processing, distribution, storage, cooking, and consumption. In addition to these questions students were also asked to assess their learning:

- What did you learn by completing the Life Cycle Assessment of your products?
- Did you find this activity made you more aware of food and where it comes from?
- What surprised you most by completing this exercise?

Learning outcomes survey.

A pre-implementation survey was conducted prior to any changes occurring in the Restaurant Operations course (HTM*3150). A link to the survey, hosted by surveymonkey.com, was sent to all students who had just finished the course in winter 2011. The pre-test survey consisted of twenty one questions, fifteen of which were based on the learning outcomes already established in the course. Students taking the survey were asked to evaluate their learning in a number of areas, such as 'monitoring of quality control' and 'the effective supervision of staff in a restaurant'. Six additional questions were designed to measure the impact of the new sustainable aspects of the curriculum and one question covered the nutritional analysis component that was introduced during the course of the project. Each question had a five-point Likert style scale, ranging from "Strongly disagree" (1) to "Strongly agree" (5). The post-test survey was administered to a different group of students who completed in the restaurant operation course during the winter 2012 cohort

Results

Curriculum Re-Design

Nutritional analysis.

The learning outcome *"I learned about the importance of understanding the nutritional value of food when designing a menu"* was shown to be statistically significant ($p=0.00$) between students using the older curriculum and those who took part in the revised curriculum. With an increase in public awareness regarding health issues caused by food as well as pending governmental regulation on menu labelling adding this module to the course was deemed valuable for students to become aware of the impact this has on menu selection.

Life cycle assessment of food.

Overall, the module on the life cycle assessment of food items showed positive outcomes. Many students went beyond the basic task requirements and included photos, video links, and maps of travel distance. Food products ranged from butternut squash grown in Elmira, Ontario, to lettuce from California, and bananas grown and shipped from

Costa Rica. Some students found food production and distribution companies uncooperative in aiding their research and many refused to provide information regarding their products and practices. It was not uncommon to encounter food companies that were unaware about the concept of life cycle assessment. Further, the students did not find any company that had conducted a LCA on any of their publically available products.

At the end of the LCA learning module, students were asked to comment on the learning value of their experience. The following summary highlights some student responses: What did you learn about the Life Cycle Assessment of your product?

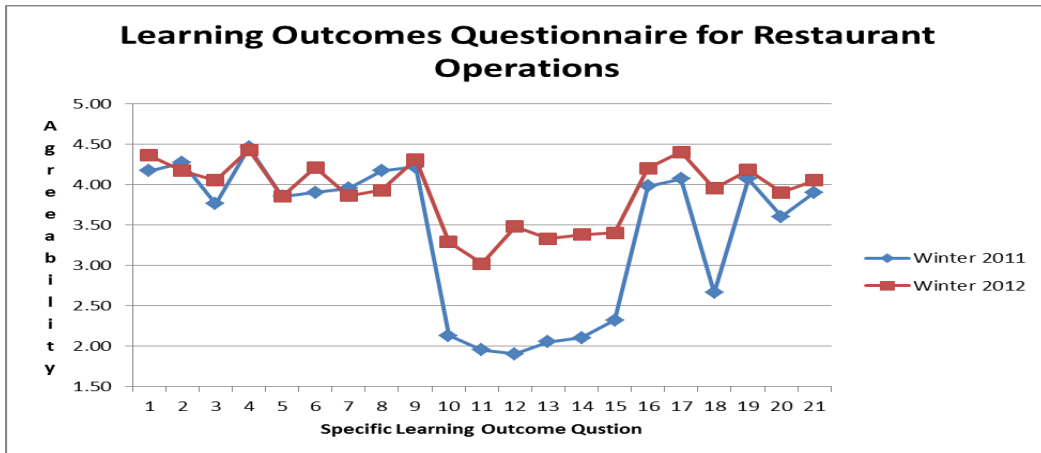
- You can get an abundance of ingredients within a short distance from Guelph, which reduces transportation.
- Many suppliers/producers were not willing to give up information regarding the sourcing of their products. Many were alarmed that someone was questioning the sustainability of their products.
- Many suppliers/producers had never heard of a Life Cycle Assessment.

Did you find this activity made you more aware of food and where it comes from?

- All students responded yes.
- The students learned about the environmental exchanges food products have to pass through before they reach a plate. This prompted the students to consider how complicated a life cycle must be for certain products.
- The students were surprised by how unsustainable certain products are as compared to what they previously speculated.

What surprised you most by completing this exercise?

- Students were surprised by the relatively small area where specific products' life cycle took place. Unlike onions, which travel all the way from Texas, the mushrooms used in PJ's kitchen were grown and harvested in Woodbridge, Ontario (a few kilometres away).
- After having completed the research, students were surprised by how much conversation the life cycle assessment assignment promoted. Students found themselves willingly discussing topics such as waste, energy consumption, and sustainability at every critical aspect of food processing.

Figure 1.0 Learning Outcomes Questionnaire for Restaurant Operations.

Learning outcomes survey.

The survey of learning outcomes was analyzed in SPSS using the Mann-Whitney U test. Class size was 83 students in 2011 and 88 students in 2012. The survey response rates were 51% and 48% respectively. The mean widest distribution between learning outcomes were learning outcomes #10 through 15 and #18. Upon further analysis, learning outcomes with a p value lower than .05 are considered significant (Table 1.0). Six learning outcomes were significant, including sustainability concepts (#10-15 and 18) ($p=0.000$) that indicates students learned more about sustainability with the revised curriculum than they had students in the previous year. Learning outcome #8 ('I learned about the operation of kitchen equipment') had a $p=0.07$, and although not statistically significant, there was a noticeable difference between the two populations.

Sustainable Improvements to PJ's

Beyond curriculum advancement, the project team piloted several sustainable improvements at PJ's during the 2011/12 academic year, many of which were adopted. Beverage offerings were changed eliminating all foreign beer and wine. This introduced students to the idea of supporting 'local', a huge movement in Canada which provides economic, social and environmental benefits. Conventional dairy items were also replaced with product offerings from a local organic producer which was shipped in reusable bottles. This change helped familiarize students with the concept of organic, many of which did not have a solid understanding of what it meant. Students were also encouraged by the chef to source more locally raised products when creating menu items. This resulted in students questioning why local food is often more expensive than imported food.

Several energy initiatives were introduced including a water audit conducted by the City of Guelph's Water department. The subsequent report provided valuable data on water usage and area for improvement and was noted and shared with students. An in-house washer and dryer were purchased for PJ's allowing them to eliminate the need for an out-sourced laundry service.

Steps were taken to see PJ's have a more sustainable approach to waste management. A compost program was created to help divert organic material from landfill and steps were taken to have cooking oil picked up where it was to be recycled into a form of bio-diesel. Both of these initiatives involved changing student's behavior to be more conscious of where PJ's waste would end up. The restaurant also eliminated the use of drinking straws in the restaurant in order to reduce its use of petroleum based plastics.

During the course of the academic year, two members of the project introduced a separate research project on plate waste at PJ's. Data collection involved the researchers standing in the dishwashing area collecting and weighing food that was not eaten by the paying customers. One of the most interesting outcomes of this project was how much conversation this action created between students working at PJ's and the researchers. Many students showed excitement and continued interest in the project results as it progressed through the year and also initiated independent study projects to explore sustainability topics in more detail.

Discussion

The higher scores for the 'sustainability' related learning outcomes suggest that the project was successful in introducing students to topics such as nutritional and life cycle assessment, food waste, and resource conservation. With the embedding of a new 'sustainably' focused curriculum in a third year restaurant operations course, it is expected students will become more aware of and have an understanding of the effect that restaurants have on the environment and in their communities. The goal of the Life Cycle Assessment was for students to demonstrate all the steps involved in getting the ingredient to the restaurant and the impact this process has on the environment. Students learned how some ingredients in a dish can have a very different impact on the environmental sustainability of our planet. A common frustration experienced by the students when completing the LCA's was their lack of ability in getting the information they needed to complete the module. With more attention being paid to the nutritional analysis of menus by both interest groups and governments, hospitality students that have been introduced to this process should stand to benefit and be able to manage change in industry more effectively.

Students' qualitative comments taken during the changes to the curriculum and assignments were informative and reinforced our contention that sustainability practices

can be taught to our future leaders in the foodservice and hospitality industry. It is anticipated that students will have better long term retention of the knowledge, skills, and values taught because they were active participants in the learning process. As Cortese (2003) notes, individuals retain 80% of what is learned by doing and only 10-20% of what is hear or read. Through the hands-on component of running a restaurant and the applicability of assignments conducted, the researchers are confident students will take the sustainability lessons and concepts learned in this course and continue to apply them elsewhere.

Not only did this project increase our students' knowledge of sustainability, but the steps taken throughout the year were recognized by a third-party certification program, LEAF (Leaders in Environmentally Accountable Foodservice). In June 2012, PJ's was one of 24 Canadian restaurants to make "Canada's Greenest Restaurants" list (LEAF, 2012).

Lessons Learned/Path Forward

Like most attempts to improve sustainability in an organization, this project met with both success and failure. While curriculum advances were achieved and resulted in the expansion of student learning, a few barriers prevented the project from meeting all of its goals. Physical complications and financial restraints prevented the research team from being able to collect the necessary data to measure potential resource conservation, while time limitations prohibited students from calculating actual green house gasses (GHG) involved in the production of their menu items. The project team had to adapt to these constraints. Instead of calculating GHGs, students were asked to do LCAs

An unforeseen outcome of the project was the creation of the University of Guelph Sustainable Restaurant Project. Since its inception, the UGSRP has evolved. Moving forward, UGSRP will take the environmentally sustainable origins of the project and expand on them, to include social and economic aspects of sustainability in restaurants as part of a field of study. As well, UGSRP is now seen as an academic resource for the Canadian food-service industry regarding issues of restaurant sustainability. The legacy of focused learning and sharing was unanticipated but a significant benefit both within the School and more broadly in the industry.

This project provided a vehicle ensuring ongoing sustainability innovation is occurring in the curriculum. The learning objectives are now embedded in the curriculum and provide an impetus for ongoing development and enhancement. As sustainability becomes an integral part of the hospitality program it allows students to gain the skills and knowledge necessary to expand sustainability practices into their professional, personal and community life. The ideas and template presented in this project can be replicated or adapted to any establishment in the foodservice industry.

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Appendix 1: Restaurant Operations Learning Outcomes

Learning Outcome:		Winter 2011	Winter 2012	Mean Difference	z-score	Significance
1	I learned about the effective supervision of staff in a restaurant.	4.17	4.36	0.19	-1.274	0.203
2	I learned about recipe development and quantity food production.	4.27	4.17	-0.10	-0.817	0.414
3	I learned about menu engineering.	3.76	4.05	0.29	-1.376	0.169
4	I learned about the safe handling of food in a restaurant environment.	4.46	4.43	-0.03	-0.635	0.525
5	I learned how to order the appropriate amount of product needed to run my restaurant.	3.85	3.85	0.00	-0.650	0.516
6	I was involved in the monitoring of quality control.	3.90	4.21	0.31	-1.569	0.117
7	I learned how to effectively control costs for my restaurant.	3.95	3.86	-0.09	-0.730	0.465
8	I learned about the operation of kitchen equipment.	4.17	3.93	-0.24	-1.815	0.07
9	I learned about the basic job requirements needed to work each	4.22	4.31	0.09	-0.569	0.57

	position in a restaurant.					
10	I learned about how restaurants can become more energy efficient by practicing sound conservation methods.	2.13	3.29	1.16	-4.370	0.000
11	I learned how restaurants can reduce water usage by implementing conservation methods.	1.95	3.02	1.07	-4.446	0.000
12	I learned about environmentally sustainable practices that can be implemented in a restaurant setting.	1.90	3.48	1.58	-5.896	0.000
13	I learned about how restaurants can set recycling and waste to landfill targets.	2.05	3.33	1.28	-4.796	0.000
14	I learned about methods and practices used in food composting.	2.10	3.38	1.28	-5.016	0.000
15	I learned about how a restaurant's carbon footprint can be reduced through using local food.	2.32	3.40	1.08	-3.945	0.000
16	I learned how to receive and properly store items ordered for my restaurant.	3.98	4.20	0.22	-0.522	0.602

17	After completing HTM 3090 I feel I have improved my ability to be effective in a work team.	4.07	4.40	0.33	-0.753	0.451
18	I learned about the importance of understanding the nutritional value of food when designing a menu.	2.66	3.95	1.29	-4.506	0.000
19	After completing HTM 3090 I feel I have improved my leadership skills.	4.07	4.18	0.11	-0.201	0.841
20	I learned how to market our event to the general population of the University.	3.60	3.90	0.30	-1.031	0.303
21	I learned how to create and keep a consistent theme throughout the event.	3.90	4.05	0.15	-0.421	0.674

EXPLORING THE TOURISTIC IMAGE OF GREECE

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ABSTRACT

Greece has been a popular tourist destination for many decades. Tourism is one of the biggest contributors to the country's GDP, able to compete on a worldwide scale and achieving remarkable progress through the years. According to the Bank of Greece official statistics, the number of tourists in 2012 was 14.8 million and initial predictions for 2013 show a further rise to 17 million with direct revenues exceeding 11 billion euros (that is 647 euros per capita income from every tourist on average). The general purpose of this study is to explore how foreign tourists perceive Greece as a tourist destination. Specifically this study aims to identify the various selection criteria for visiting Greece, to evaluate tourists' satisfaction during their stay in Greece and to identify the most popular Greek tourist destinations. To carry out the survey we used a convenience sample from 40 different countries around the world but primarily European. The final sample was comprised of 201 foreign tourists, who shared their opinions and experiences with us after visiting Greece and before returning home. The research was based on primary data collected through individual interviews (supported by a structured questionnaire) at the departure hall of Athens International Airport "El. Venizelos", from 15/05/2012 until 15/08/2012. The general tourist image of Greece is as "a holiday destination". Empirical findings report that the most popular destinations in Greece are those developed in recent years, followed by traditional mass tourism areas, alternative destinations with special interest and finally the urban centers (mostly Athens). Findings also revealed that tourists select Greece for many different reasons (selection criteria). The most significant criteria appear to be the climate,

the natural beauty, the culture and the warm hospitality of Greeks. Tourists experienced high satisfaction levels when visiting museums and archaeological sites and when tasting Greek food and beverages. The quality of accommodation also scored high. Finally, tourists were not satisfied by the environmental pollution, the high price of goods and services, the road signs and the quality of the roads.

Keywords: Greek tourism, tourist satisfaction, touristic destination, selection criteria.

1. INTRODUCTION

Over the decades, tourism has experienced continued development to become one of the fastest growing economic sectors in the world. It is closely linked to economic growth and encompasses a growing number of new destinations. These dynamics have turned tourism into a key driver for socio-economic progress to those countries who invested on their touristic infrastructure. For Greece, tourism has been the most dynamically growing sector since its contribution to national economy is measured at 34.4 billion euros, representing 15.1% of the total Gross Domestic Product. In terms of employment, estimations state that 741,000 job placements are supported by tourism (IOBE, 2011). The incorporable match of different destinations and contrasts attracts every year millions of tourists from all around the globe, who visit Greece in order to experience the authentic Greek touristic offer. It is the place they can discover the Greek history and culture, the environment, the climate, the food and the aesthetic integrity of Greek islands.

The general purpose of this study is to explore how foreign tourists perceive Greece as a tourist destination. Specifically this study aims to identify the various selection criteria for visiting Greece, to evaluate tourists' satisfaction during their stay at Greece and to identify the most popular Greek touristic destinations. To achieve the purpose (and the aims) of this study we carried out a survey and collected various types of data concerning: respondents' demographic characteristics, activities and places they opt for, average per day expenditures, trip organizing factors, satisfaction level, pre-made image of the country, intention of coming back at the near future, efficiency of Greek advertising campaign abroad, alternative competitor countries to Greece etc.

2. INDICATIVE LITERATURE REVIEW

Regarding tourist market data, the Greek authorities periodically carry out sample surveys of foreign visitors in order to identify the type of tourists that travel to Greece and to determine the factors which influence their preferences and their purchasing behaviors (Buckley and Papadopoulos, 1986). It must be recognized, however, that the tourist product is a composite product and that there is more than one type of client. At this direction, market segmentation is required since the subdividing of a market into distinct

subsets of customers, where any subset may conceivably be selected as a market target can be reached with a distinct marketing mix' (Kotler, 1976).

As Kaynak and Yavas (1981) suggested in their study, once purpose-orientated segments are identified they can be mapped according to demographic and psychographic characteristics thus helping policy makers to target their strategies more precisely. In this respect, the Greek tourist authorities in more recent surveys endeavored, with the help of international market research and advertising agencies (e.g. McCann-Erickson, A.C. Nielsen Hellas and Aspect) to establish a visitor profile for each major country supplying tourists to Greece.

The European market for Greek tourism is by far the most important. According to data given by Greek National Tourism Organization (GNTO) and National Statistical Service for the period 1950-1995, most visitors (93.2%) originate from Europe and 70.2% from the EU, especially United Kingdom, Germany, Sweden, Finland, Deutschland and Austria (Buhalis, 2001: Greek National Tourism Organization and National Statistical Service). Although these nationalities are the dominant markets, the British and the Germans contribute almost half of all arrivals. Examining the results of an even more recent sample survey, carried out at 2008 under the auspices of the Greek National Tourist Organization of Greece among foreign travelers visiting the country by plane, it can be observed that the demand of British and Germans was at high levels (53.8% and 15.9% respectively), while Russians (13.1%) and French (5.1%) completed the top-four markets visiting the country. As Buckley and Papadopoulos (1986) state: "Rising transport costs play an important role in determining choice for a tourist destination. Hence Europeans are more likely to travel to a nearby tourist destination instead of far off places such as the USA and Australia".

Buhalis (2001) mentions that the inconvenience of indirect transportation schedules, large differentials in charges for groups and individual customers by accommodation establishment, lack of information about the Greek tourism product, as well as insufficient marketing by SMTEs (Small and Medium Touristic Enterprises) have enabled tour operators to act as intermediates between consumers and principals and to play a dominant role in the tourism industry. However, the development of the Internet enables prospective visitors to pre-book their packages independently and to use cheaper non-frills airlines and leisure fares of schedule airlines for their transportation (Buhalis, 2001).

GNTO (2008) survey results confirm that a vast majority of foreign tourists are travelers-repeaters, since they have come once (18.4%), twice (12%), three times (11.5%), more than four times in Greece (17.8%) or they even visit the country every year (7.2%). The areas visited by these kinds of visitors are described by Gilbert (1984, 1990) as "status areas" and is a result of the unique product perceptions by the tourism market. These unique attributes may be genuine or imagined and thus, a destination is regarded as irreplaceable, increasing consumers' loyalty.

Nevertheless, despite its popularity and growth over the last 40 years, the Greek tourism industry has reached a stage where both its potential and competitiveness have become questionable (Buhalis, 2001). "Rapid increases in price mean the country is no longer perceived by mass market clients as cheap in relation to comparable destinations in the Mediterranean, but much of the country's tourism infrastructure, hastily built in response to demand for cheap accommodation, does not meet the needs of a market less sensitive to price and more concerned with quality and value for money" (Economist Intelligence Unit/EIU, 1990). As a result, Greece fails to attract the desired "high-quality, high-expenditure" tourists and is increasingly unable to satisfy their requirements (Conway, 1996). The deterioration of the tourism product and image leads to a lower willingness-to-pay by consumers, which consequently leads to a further drop in quality, as the industry attempts to attract customers with lower prices. Consequently, tourists' expenditure per capita in Greece gradually deteriorates, while their volume increases (Association of Greek Tourism Enterprises/SETET, 1993). According to SETET (2012), United Nations World Tourism Organization/UNWTO and the World Economic Forum 2012 ranks Greece at the third place regarding tourism receipts, competitiveness and arrivals. Spain and Cyprus have achieved the greatest performance while Egypt and Croatia are ranked at the fourth and fifth place respectively.

3. METHODOLOGY AND SAMPLE

To carry out the survey we used a convenience sample from 40 different countries around the world but primarily European. The final sample was comprised of 201 foreign tourists, who shared their opinions and experiences with us after visiting Greece and before returning home. The research was based on primary data collected through individual interviews (supported by a structured questionnaire) at the departure hall of Athens International Airport "El. Venizelos", from 15/05/2012 until 15/08/2012. Descriptive statistics were calculated for all variables. Table 1 provides some basic sample data.

Table 1: Sample characteristics of Tourists

<u>Variables</u>	<u>Characteristics/values</u>	<u>Results</u>
Sex	Male	48.8%
	Female	52.2%
Age groups	19-30	42.2%
	31-45	22.9%

	46-65	21.4%
	13-18	9%
	66+	4.5%
	Mean	34.7 years
Nationality	Europeans	67.6%
	British	10.9%
	French	7.5%
	Italians	7.5%
	Spanish	6%
	Belgian	5%
	Germans	4%
	Other	26.7%
	Non Europeans	32.4%
	Australians	14.4%
	Americans	7%
	South Africans	3%
	Other	8%
Professional status	Employed	56.2%
	Students	32.3%
	Retired	7%
	Housewives	2.5%
	Unemployed	2%

Previous visit	Yes	55.7%
	No	44.3%

The sample originates from 40 different countries worldwide. Non-European citizens consist 32.4% of the sample including tourists from Australia (14.4%), USA (7%), South Africa (3%) and countries as Korea, Canada, Argentina, Brazil, China, Dominican Republic, Philippine, Mexico, New Zealand, Palestine and Yemen (the rest 8%). The majority of our sample originates from Europe (67.6%). More specific; United Kingdom (10.9%), France (7.5%), Italy (7.5%), Spain (6%), Belgium (5%), Germany (4%), Netherlands (3.5%) as well as Austria, Denmark, Iceland, Ireland, Norway (2% each), Switzerland, Russia, Rumania, Sweden, Bulgaria, Finland, Hungary, Malta, Poland (1% each), Portugal, Croatia, Estonia, Serbia and Ukraine (the rest 4.2%). The average tourist's age of our sample is approximately 35 years old; 51.2% are women and 48.8% men. The majority of our sample are employed (56.2%) and 55.7% of the total sample have previously visited Greece.

4. EMPIRICAL RESULTS

Table 2 presents the touristic preferences (in terms of areas chosen and classification of destinations) and data about organizing their trip to Greece.

Table 2: Touristic Preferences and Trip Organizing

<u>Variables</u>	<u>Values</u>	<u>Results</u>
Types of chosen areas	Coastal/Seaside	75.6%

(Multiple Response)	Urban	28.4%
	Mountains	11.4%
	Rural	5%
	Lakes	2%
Classification of destinations	Recently-developed areas that combine summer holidays with different types of touristic development (Amorgos, Folegandros, Milos, Andros, Kefalonia, los etc.)	38.5%
	Mass tourism areas (Santorini, Crete, Corfu, Mikonos, Paros etc)	26.5%
	Specialized destinations (Meteora, Olimpia, Idra, Chios, Koroni, Alonissos, Sporades, Kalavrita, Methana)	12.5%
	City centers (Athens, Thessaloniki etc)	17.9%
	Other	14.6%
Purpose of the trip	Holidays and recreation	75.1%
	Professional Reasons	16.4%
	Other	8.5%
Way of organizing their trip	Independently	79.6%
	Via tour operator	20.4%

Accommodation	Hotel/ 2-3 stars	28.3%
	Hosted by friends or family	19.4%
	Hotel /4-5 stars	18.9%
	Furnished apartments	12.4%
	Rooms to let	7.5%
	Free camping	5%
	Organized camping	4.5%
	Hotel/1 star	4%
Expenses per day (Excluding accommodation costs)	Mean	79.9€
	Median	60€
	SD	59.3
Information sources to organize a trip to Greece (Multiple response)	Internet	83.1%
	Friends and family	43.8%
	Previous experience	22.4%
	Travel agents	20.4%
	Newspapers/magazines	6%
	Radio/TV	3%
	GNTTO Offices	1%
Nature of activities	Passive (sightseeing, swimming, cruises)	65.2%
	Active (participation in social and environmental friendly)	34.8%

The

initiatives)

majority of tourists opt for seaside (75.6%) and urban (28.4%) areas and only a few prefer rural, mountain or lake locations (5%, 11.4%, 2% respectively). Destinations as Aigina, Amorgos, Andros, Chalkida,, Chalkidiki, Folegandros, Ios, Ithaki, Karditsa, Karpathos, Kavala, Kefalonia, Kithira, Kos, Leukada, Lesvos, Naxos, Patra and Samos which follow the summer holiday model even though their growth has been accomplished lately, attract the highest percentage of travelers (38.5%). Meanwhile, 26.5% of the sample prefer the traditional, classic places that have been starring for decades, like Santorini, Crete, Corfu, Rhodes, Mikonos and Paros. 12.5% of respondents travel to destinations whose development has been associated with specific religious (Meteora), cultural (Olimpia, Idra, Chios, Koroni), ecological (Alonissos, Sporades), complex environmental sources (Kalavrita) or thermal ones (Methana). Visitors who prefer to visit city centers are 17.9%.

67.51% of the total sample visited Greece for holiday and recreation and only 16.4% of respondents came for professional reasons. The survey imprints a strong trend towards independently organized trips (82.1%), whereas tour operators seem to lose their dominant role (17.9%). Therefore, the main information source to organize a trip to Greece is the net (83.1%) and second best the friends and family (word of mouth) with 43.8%. Approximately 20% of the total sample trusts tour agencies, 23.4% had already a previous personal experience about the country and only 9% are advised by traditional means (tv, radio, newspapers, magazines). Minor is the contribution of GNT0 offices at countries of origin (only1%).

Regarding accommodation, high and medium category hotels are preferred (47.2%), as well as auxiliary and additional touristic infrastructure/facilities (rooms to rent, apartments, camping- 29.4%). Moreover our empirical findings confirm an international trend which indicates that tourists select to stay at their friends or relatives (19.4%). This phenomenon is either attributed to economical parameters (free accommodation) and/or to strong and close relationships kept with the locals. Interestingly, 35% of incoming tourists inclined towards active tourism, visiting local cultural events, cooking and tasting local food recipes, language learning, observing biodiversity while the rest 65% favored for holidays involving only sightseeing, swimming and cruises. The mean of the personal daily expenses (excluding accommodation costs) is at 79.9€ per person (Standard Deviation=59.3, Median=60€, Min=10€, Max=300€).

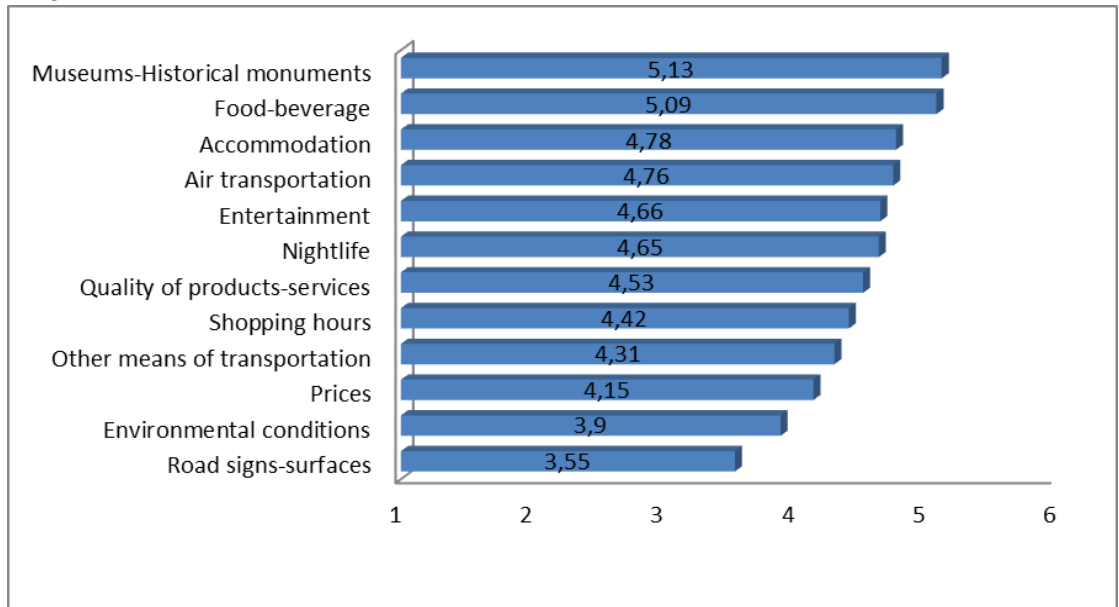
Table 3: Hierarchy of selection criteria visiting Greece

Criteria	Percentage of respondents
Climate	66.7%

Natural beauty	61.2%
Culture	50.2%
Friendly people	36.8%
Good food/wine	32.3%
Hospitality	30.3%
Historical monuments	27.9%
Cost of living	13.4%
Thermal bathes	3%

Table 3 presents hierarchically the selection criteria for visiting Greece. The top two selection criteria are: (a) the climate (66.7%) and (b) the natural beauty of the country (61.2%). Then follows: culture (50.2%), friendliness of the locals (36.8%), tasty food and wine (32.3%), Greek hospitality (30.3%), historical monuments (27.9%), cost of living (13.4%) and thermal bathes (3%).

Diagram 1: Evaluation of factors associated with tourist satisfaction



(scale: 1= worst evaluation, 6= best evaluation)

Diagram 1 presents the evaluation of factors which are mostly associated with tourist satisfaction during their stay at Greece. It is interesting to note that all factors were evaluated higher than the average (3.5 points). The highest satisfaction score was for museums and places with historical and cultural interest (mean: 5.13). Then we have food and beverage (mean: 5.09), accommodation (mean: 4.78), air transportation (mean: 4.76), entertainment (mean: 4.66), nightlife (mean: 4.65), quality of products and services (mean: 4.53), shopping hours (mean: 4.42), other means of transportation (mean: 4.31), prices (mean 4.15), environmental conditions (mean: 3.9) and road signs-surfaces (mean: 3.55). Another indication measuring tourists' satisfaction is their intention of coming back in the near future: 72.1% of the total sample is willing to visit Greece again, 22.9% is indecisive, while only 5% answered negatively.

Tourists, prior to their arrival, had a "Good" image for Greece (mean 4.10 at a 1-5 scale, 1: very bad, 5: very good). After their trip to Greece we asked them if their expectations were fulfilled: the mean was 4.32 (1-5 scale, 1: expectations not fulfilled at all, 5: totally fulfilled expectations).

Table 4 presents the top ten spontaneous statements of tourists before leaving Greece.

Table 4: Tourists' top ten spontaneous, authentic statements

	Nationality	Age	Statement
1	Hungarian	22	<i>Local people were very friendly. They were extremely happy if they managed to say a few words in my language. I really love autumn's temperature, beautiful beaches and the nature!</i>
2	Irish	22	<i>The sun, the beaches and the people were the best I have ever met. I think I won't find anywhere else in the world sandy beaches like these ones. I just loved it!</i>
3	Polish	31	<i>Amazing, warm hospitality from the part of the locals, peaceful and relaxing atmosphere, wide variety of things that Greece has to offer. Cultural sites, areas with a special, historical interest!</i>
4	American	23	<i>People were very kind, spoke English and made my experience worthwhile. The culture and history were amazing to experience first-hand!</i>
5	New Zealander	20	<i>I loved the attitude of locals. They always laugh and smile for a good reason!</i>
6	Spanish	69	<i>Lovely country, nice people, scenic islands, excellent civilization. Nothing compares to Greece!</i>
7	British	34	<i>Fantastic food at "tavernas"! People at the villages welcomed us in the best way! Excellent, unspoiled mountains and hills!</i>
8	Belgian	43	<i>The beautiful, pure, blue color of the sea. Ideal for swimming!</i>
9	South African	33	<i>Greece was far better than people in my country thought it would be. And even though all these things have happened in the economy, everybody seemed still happy. Strong characters!</i>
10	Dutch	49	<i>I feel like I am Greek too. "Kalimera" (Good morning)!</i>

Table 5: Greek Image

'I characterize Greece as...'	Mean
a Mediterranean holiday destination	4.36
a country-coast	4.28
a country where somebody must travel	4.12
a country of civilization	3.95
a country of qualitative natural environment	3.84
a country for independent tourism	3.81
a country for specialized and alternative tourism	3.32

(scale: 1= strongly disagree 5= strongly agree)

As Table 5 demonstrates, Greece is principally a Mediterranean holiday destination (mean 4.36) characterized as a "Country-Coast" (mean 4.28), a country where somebody must travel (4.12), a country of civilization (3.95) with qualitative natural environment (3.84). Official Greek advertising touristic campaign abroad was evaluated as average (mean value: 3, 1-5 scale: 1= very bad, 5= very good).

Table 6: the position of Greece against the top competitor countries in Tourism

Position	Competitor countries	Percentage of respondents
1	Italy	23.4%
2	Turkey	14.4%
3	Spain	13.9%
4	Croatia	13.4%
5	Greece	11.9%

6	Portugal	2.5%
7	France	2.0%
8	Cyprus	1.5%
9	Other	17%

With regard to the countries that tourists would alternatively select if they were looking for a similar type of holidays (Table 6), 65.1% of respondents answered that it would be a Mediterranean destination; neighboring Italy is listed at the first place (23.4%), new-comer Turkey at the second (14.4%) , "traditional" Spain at the third (13.9%) and alternative Croatia at the fourth one (13.4%). Greece is at the 5th position. Then come Portugal (2.5%), France (2%), Cyprus (1.5%), Egypt, Brazil and others with insignificant, however, percentages.

5. DISCUSSION AND POLICY PROPOSALS

It is common knowledge that tourism is one of the crucial fields in the country's national strategy and economic growth. Its ability to respond, however, to current challenges is going to determine its critical role at the areas we previously analyzed. Having completed its life-cycle, mass tourism is no longer an "up-market" product. Demand diversification should aim to swift the mass tourism product of low cost, low value-added, low-skilled employees with unprofessional services, to the offering of a differentiated product of high quality, high value-added, employing appropriately trained staff which provides high quality services (Maroudas et al, 2013); this new touristic offer should promote Greek culture and civilization and comply with high environmental standards. Indicatively, we mention three different types of specialized tourism which can be exploited:

i) Cultural tourism. Even though national cultural heritage represents one of the major criteria for guests, there is a need to form a multi-dimensional image of Greek culture and tradition other than just antiquities and historical monuments. These efforts are to focus on the protection and preservation of cultural heritage, revealing elements of local tradition (e.g. traditional cuisine, traditional dances etc.) even exploiting the plethora of orthodox churches (religious tourism).

ii) Agro-tourism. The development of agro-tourism would be able to stimulate rural areas, which were selected only by a low percentage of the total survey sample, through the construction of proper accommodation facilities or even tourists' encouragement to observe/participate at the production process of Greek popular and traditional products (such as wine, ouzo and olive oil).

iii) Medical tourism. Although Greece possesses a great number of advantages with regard to medical tourism, such as international airports and seaports, many private medical clinics, a great number of qualified doctors in every specialty and plethora of historical and touristic attractions, it has an insignificant market share (Theofanides and Papanikolaou, 2012). The above statement is verified by the survey results of this study, which indicated that thermal bathes are a negligible criterion for tourists visiting Greece. As medical tourism has gained a significant market share during the last decade, opportunities may emerge by offering complete and diversified packages to patients in order to convince them to select Greece for medical care.

Furthermore, new specialized forms of tourism could be promoted in order to increase Greek touristic market share such as: (a) Philosophical Tourism, (b) Mythological Tourism, (c) Homeric Tourism and d) Tourism for the origins of European Civilization deriving from ancient Greek locations (Minoan civilization in Crete, Mycenaean civilization in Peloponnese, Aegean civilization etc.).

The negative assessment regarding environmental conditions illustrates the importance of diminishing the carbon footprint for businesses involved in the touristic sector. All types of accommodation facilities should meet the criteria of "green" management and certification. For example logical use of natural resources, environmental friendly treatment of waste, water and energy saving etc.

Our research revealed that tourists experienced high satisfaction levels when visiting museums and archaeological sites and when tasting Greek food and beverages. The quality of accommodation also scored high. On the other hand tourists were not satisfied by the high prices of goods and services, the road signs and the quality of the roads. High prices of goods and services in Greece combined with the low cost emerging touristic destinations of Turkey and Croatia impose a major strategic threat for Greek tourism. It is of extreme necessity for Greece to justify high prices by offering high value to tourists (value for money). Furthermore, it is advisable to enhance transportation infrastructure (roads, ports, public means of transportation and road signs) so that tourists can easily transport within Greece (improving transport infrastructure will not benefit only the touristic sector but the whole national economy).

Moreover, extended use of internet from tourists in order to organize independently (without using a travel agent) their vacations requires the training of touristic businesses to e-tourism applications. Professionals of the touristic sector must view the adoption of new technologies as a significant tool for promoting their businesses.

Widely classified as a "country-coast" and "a typical Mediterranean country", Greece has deteriorated its position as a winter destination. Regarding this aspect, a supportive plan should aim at a twelve-month promotion of Greek touristic services, using creative advertising and targeting on groups with special interests. Furthermore, accommodation infrastructure must be adjusted and developed in that way, to host guests who prefer

winter destinations. Finally, the alarming outcome of our research concerning "average" effectiveness of the advertisement campaign of Greece abroad and minimum exerted influence of GNTTO offices in the countries of origin, require immediate action: creation and usage of one attractive and stable advertising message (slogan) that reflects the general image of Greece to foreigners and hiring high quality professionals at GNTTO offices abroad with the intention to be effective sellers-promoters of Greek touristic product.

6. CONCLUSIONS

Tourism is one of the most important sectors of the Greek economy. In recent years it is growing dynamically achieving a worldwide position. In the last year (2013) the number of tourists approaches 17 million and Greece position is on of the top in Mediterranean. Our research is mainly centered on how foreign tourists perceive Greece. We used a convenience sample from 40 different countries of the world, primarily from Europe based on a structured questionnaire addressed to 201 foreign tourists who shared their opinions and experiences with us after visiting Greece and before returning to their home. The data were collected at the departure hall of Athens International Airport "El. Venizelos", during the typical tourist period from: 15/05/2012 until 15/08/2012.

Results show that the majority of tourists opt for seaside (75.6%) and urban (28.4%) areas and only a few prefer rural, mountain or lake locations. The most significant criteria for choosing Greece are: the climate, the natural beauty, the cultural heritage and the warm hospitality of the Greeks. Tourists experience high satisfaction when visiting museums and archaeological sites and when tasting Greek food. The quality of accommodation scored high, but tourists were not satisfied by the environmental pollution, the high price of goods and services and the transportation conditions.

The study presents concrete policy proposals in the fields of Cultural Tourism, Agrotourism, Medical Tourism and suggests other forms of specialized tourism such as Philosophical Tourism, Mythological Tourism, Homeric Tourism etc., in order to improve the status and the image of Greece as a popular tourist destination all over the world.

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ICTS INTEGRATION INTO DESTINATION MARKETING ORGANIZATIONS (DMOS) TOURISM STRATEGY

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ABSTRACT

Given that the development of ICTs infrastructure and use has positive effects on economic growth and that tourism often acts as a driver of economic and social development, especially in developing areas, the exploitation of technology is critical for the tourism industry to achieve competitive advantage and to provide economic benefits for their locality, by reducing the asymmetric distribution of economic, political, and cultural capital globally. This study argues that the gap between the “ICTs – included” and “the ICTs-excluded” widens, further jeopardizing the social, cultural, and economic development at the global level; the consequently created digital divide may lead to digital

and social exclusion—when individuals, communities, and organizations are unable to fully participate in the network society and determine their own destiny. For tourists and destinations, this means being unable to participate in the emerging electronic market and benefit from arising opportunities.

The authors assert that in this newly evolving production environment the most efficient relationships are based on the creation of alliances, partnerships and networks among firms and that learning, collaboration, and the active sharing of online experience become extremely important in the process of knowledge creation. Only DMOs and other tourist stakeholders with an ability to learn quickly and to translate that learning into action rapidly will be able to gain competitive advantages in these high velocity marketplaces. Destination communities and regions rely on network formation (between businesses, between the private and public sectors) for the development of competitive tourist products. These can be attained through a number of mechanisms including mutual dependency and adaptation, discussion and negotiation, honesty, long-term commitment, quality control and shared knowledge. Networks may also be created and enhanced by the emergence of new information and communication technologies (ICTs). Virtual networks, which can be defined as permeable structures without physical borders of separation from the environment, comprising a multiplicity of autonomous, interdependent, and self-organizing actors that rely on the internet infrastructure to integrate and exchange value, are an example of these new concepts.

1. INTRODUCTION

Over the last decade, investments in ICT in the tourism and hospitality industry have substantially increased. The challenge for the tourism operator is the provision of accurate, localised data, increasingly via ICT, whilst maintaining a trust relationship with the tourist. Developing destinations face increasing disadvantages in establishing links with their clientele, promoting their resources, distributing their products, and collaborating with industry partners, especially in high- and upper-digital access markets. This has considerable effects, as not only do they fail to fulfil their full potential and then to gain sufficient economic and socio cultural benefits but also they are unable to build their resources and expertise in order to improve their competitiveness and ensure their future prosperity.

ICTs have the potential to upgrade the quality of life by providing new tools for better access to information, knowledge management as well as sharing. A shift of power to the buyer is also evident in that the modern day tourist has ready access to the World Wide Web and a store of information. The tourist consumer has more choice when buying travel products also because of the options provided by on-line travel agents and direct marketing by airlines. Sterne, (1997) adds getting management support, assigning

responsibilities, establishing procedures, and setting standards against which the efforts are measured to this list.

In tourism, the ability of destination organizations and businesses to select, to aggregate, and to distribute information to the right consumer at the right time and in the right place is critical. ICT-skilled tourism enterprises and destination marketing organizations (DMOs) have huge opportunities to apply ICTs for communicating their offering, enhancing their visibility on the market and strengthening their competitiveness (Gretzel, Yuan, and Fesenmaier 2000; Buhalis 1998). Design, content, and production access can be achieved through appropriate training, which stimulates the development of specific skills and also trigger staff behavioural intention to use ICTs. In addition, institutional and governmental incentives can support businesses' decision to invest in innovative tools and applications.

The integration of IT into the organizational fabric of the destination marketing organization (DMO) is an important key to success. It is difficult for most DMOs, however, to keep pace with the evolution of new technologies, the emergence of innovative advertising strategies, the changes in the consumer market, and the growing competition due to increasing globalization. They often have to struggle with limited financial and human resources, a lack of technological expertise, and time constraints. The question of how to move from the current way of doing business to one that is responsive to these changes becomes a vital concern.

2. DIGITAL DIVIDE IN THE TOURISM INDUSTRY

Many countries are having a two-tiered structure (Werthner, 1999) in which Tier 1 is made of a small number of large, often global, players, and Tier 2 is made up of a much larger collection of small and medium tourism enterprises (SMTEs). Larger players are well versed in current management practices, including information technology applications. Large enterprises are keen on facilitating the uptake of online technologies because they have a critical mass of infrastructure, personnel, and related experience to undertake this transition. These enterprises are generally high up the distribution chain and undertake a large percentage of their communication with other businesses in the chain; hence, they are primarily concerned with business-to-business applications for online technologies. They involve information exchange, inventory management, and alliance facilitation, like for example, association with Travelport, Sabre and Amadeus GDSs.

In contrast, Tier 2 enterprises have mostly limited technological infrastructure and financial power, the level of marketing know-how is generally low, and direct access to the market is limited and they tend to be located in regional and rural areas. Tourism businesses (especially small to medium enterprises (SMEs)) and DMOs with low use of ICTs are often cut off from electronic distribution channels and eCommerce (Buhalis and Kaldis, 2008; Collins, Buhalis, and Peters, 2003). Tourism destinations and SMEs in peripheral, low

digital- access regions are even more disadvantaged than their colleagues located in developed countries (Buhalis, 1998, 2003; UNCTAD 2004). Not only are they excluded from the considerable set of their prospective customers but they also struggle for access to expertise, capital, and technologies that could enable them to promote their products and develop suitable tools for attracting new markets (Minghetti and Buhalis, 2010). Their online presence often reflects the level of ICTs deployment in their own location rather than the expected level of use by their clientele, which often operates in high-ICT regions. These destinations and businesses have a high dependence on external traditional intermediaries (i.e., tour operators and incoming agents) to promote and sell their products (Bastakis, Buhalis, and Butler, 2004; Buhalis, 2000).

According to Warschauser (2004), "What is most important about ICTs is not so much the availability of a computing device or the Internet line, but rather people's ability to make use of that device and line to engage in meaningful social practices." Awareness of the functionality of the Internet, as well as resources and expertise necessary to take advantage of this functionality may be lacking, especially with respect to SMTEs. The nature of the Web provides new opportunities but also poses serious threats, especially to small tourism organizations. Naisbitt, (1994) refers to this phenomenon as the "global paradox." This ambiguous situation calls for risk taking and at the same time requires careful management. It is not clear that individual SMTEs are able to use this intelligence, or recognise its value. Information potentially available therefore is lost. Also infrastructure issues, such as access to broadband, may impede its use. Disparities in possessing, controlling, processing, communicating, and distributing information have a greater impact on tourism production and consumption than in other economic sectors. These disparities are determined by both the technological tools available to provide and distribute accurate information widely, and the ability to use these tools effectively (Minghetti and Buhalis, 2010).

Paradoxically, as technology progresses, the gap between the "ICTs – included" and "the ICTs-excluded" widens, further jeopardizing the social, cultural, and economic development at the global level. Highly developed tourism markets and destinations that systematically use and benefit from advanced computer-based and Internet applications will continue to strengthen their position and affect the evolution of the sector. Conversely, others who are able to use basic or simple electronic applications, or those that do not use them at all, will stay behind and be excluded from the first tear of the global tourism community. They will inevitably be more dependent on offline and online tour operators and travel agencies for putting their offerings forward to the marketplace.

Digital divide may lead to digital and social exclusion—when individuals, communities, and organizations are unable to fully participate in the network society and determine their own destiny (Selwyn, 2004). For tourists and destinations, this means being unable to participate in the emerging electronic market and benefit from arising opportunities. Recent

studies carried out in Thailand (Vatanasakdakul, Tibben and Cooper, 2004) and in the tourism sector (Cosh and Assenov, 2007) have shown that although the government has funded projects to improve ICTs infrastructure and widen Internet and e-Commerce functionalities, their use in firms is still very limited. The reason is that immediate social and cultural expectations of e-Commerce users in the country are not met by current technologies.

In addition, the high dependency of the local industry on external trade operators and, in the case of tourism, from intermediaries located in highly developed markets, does not give incentives to Thai travel agents to modify their business model. Local agencies generally show a lack of knowledge of e-Commerce and poor Web design capabilities (content management, security issues, etc.). Many of them also feel “that the online channel is already overpopulated, while they are already busy in satisfying physical customers” (Cosh and Assenov, 2007:499). Consequently, digital divide initiatives should be combined with development policies for tourism in order to support the welfare of destinations.

Although the diffusion of ICTs has a great potential for ensuring sustainable global and tourism development, especially in less developed areas (UNCTAD, 2004), disparities still exist in access, skills, use of ICTs, and services. Many infrastructural and above all knowledge barriers have to be overcome therefore to support a wide use. This also applies to the developed regions of the world, which face the challenge of ensuring that everybody has the opportunity to benefit from Internet services. (Minghetti and Buhalis, 2010).

3. USE OF INNOVATION SYSTEMS AND ICTS IN TOURIST DEVELOPMENT

The innovation process thus demands a selective collection, use, and dissemination of information, as well as an intensive interaction among multiple actors. And so, innovation would seem to call for a systematic reorganization of how society and economies function, aiming to enhance the creation and development of social and economic networks, supported by trust and structured around the sharing of common interests, languages, and knowledge. Being able to integrate global knowledge and networks into local innovative processes is of crucial importance, and the existence of an absorptive capacity and learning atmosphere is therefore needed in a contemporary innovation system (Asheim and Isaksen, 2002).

ICTs are driving the innovation process by reducing distance and time constraints in inter-personal and inter-institutional contacts and by reducing the complexity of exchanging and acquiring information (Santinha, Castro, and Sobral, 2006). However, while it is important to acknowledge their important role, these technologies only play a part in enabling the many processes and relationships that characterize the patterns of socioeconomic development. An efficient use of ICT-based services demands the existence of dense

immaterial networks, related to social interactions that occur within and between places and socioeconomic activities, allowing in turn the constant production of innovation.

Innovative solutions are the key to the promotion of tourist regional development. Rapid developments in mobile telephony, cable, fibre-optics, and wireless applications as well as in the field of computer hardware and software products appear to offer excellent opportunities to tourism development. (Santinha and Castro, 2010; Batlle et al., 2009; Bell, 2008; Van der Meer and Van Winden, 2003). Numerous empirical studies of innovation systems and industrial districts indicate advantages in terms of adaptability and viability. As a consequence, single enterprises, when interlinked to collaborative relations, tend to be more shielded from the exposure to immediate competition (Markusen, 1996). However, the individual and collaborative actors in innovation systems need to address external pressures continuously, such as, for example, shifts in technological paradigms or changed regulatory environments (Hjalager, 2010). If innovations systems slide into a 'comfort' zone and lose their ability for rapid catch-up, their vulnerability may increase (OECD, 2006). This perspective is perhaps most important in environments with many small enterprises, as is the case in tourism. (Hjalager, 2010).

In the newly evolving production environment the most efficient relationships are based on the creation of alliances, partnerships and networks among firms (Castells, 2004). Destination communities and regions rely on network formation (between businesses, between the private and public sectors) for the development of competitive tourist products. These can be attained through a number of mechanisms including mutual dependency and adaptation, discussion and negotiation, honesty, long-term commitment, quality control and shared knowledge. Networks may also be created and enhanced by the emergence of new information and communication technologies (ICTs). Virtual networks, which can be defined as permeable structures without physical borders of separation from the environment, comprising a multiplicity of autonomous, interdependent, and self-organizing actors that rely on the internet infrastructure to integrate and exchange value, are an example of these new concepts (Romano, Eliva and Passiante, 2001; Pollock, 1998).

Tourist places have often been treated as more or less territorially bounded destinations with the focus laid on organizational and marketing strategies. The destination is seen as a 'container' of attractions and various facilities such as transport, accommodations and food and hence the tourism experience (Tinsley and Lynch, 2001). As a result, the complexities of tourism practices disappear behind dualistic categorizations; on the one hand are tourists, on the other tourist organizers working within destinations. However, the territorial model of industrial districts, where tourism networks are made of relations between fixed nodes in one-dimensional time-space and resting on the physical proximity of homogeneous actors, does not seem to be successfully implemented in tourism. (Bærenholdt et al., 2004). Studies based on this understanding of networks have shown

that tourism industries are rather weak in networking, at least in the same way as traditional production industries (Hjalager, 2000; Tinsley and Lynch, 2001). Instead, the concept of networks is in line with much of economic geography and innovation theory, which has focused on the significance of inter-firm relations and learning economies.

The apparent association of growth in regions and of industries with conspicuous networking activity has encouraged suggestions that successful tourism regional economies in the world economic system must be 'intelligent' or learning regions (Feldman, 1994). Networks are thus part of the dynamics of organizational creativity, directed towards building and maintaining competitive links to the global economy, and based on strengthening existing competitive activities (Hansen, 1992; Castells, 2004). At the same time, the sustainability of the industry may well be tied to creating effective alliances between the private and public sectors. Thus, networks become fundamentally based not on spatial proximity, or shared interests, but on notions of trust and reciprocity. The future competitiveness of destinations, and the development performance of tourism, will not simply depend on a destination's natural and cultural resource base, its ability to harness new technologies, or its depth of human capital.

In this challenge, four specific criteria must be taken into account: to guarantee an integrated vision of the tourism regional development strategy, to include initiatives that spread the advantages of using virtual platforms so that ideas can be replicated and new initiatives stimulated, to assure the collection and spread of tourism information concerning the productive system and firms' needs, and to facilitate the access to information and supporting services by tourism stakeholders (Santinha and Castro, 2010). Regional tourism initiatives are driven by the need to maximize marketing penetrations for the region and its product, facilitate the entry of local enterprises into e-commerce and demonstrate comprehensiveness of coverage of product in the region, whether or not individual products have independent online presence.

Recently, in many countries, has emerged the need to establish a resource centre to develop education, training, and projects' facilitation, to support the move to online tourism business practices. The responsibilities of the National Online Tourism Resource Centre could include:

- maintaining a resource directory, including a directory of high-standard examples, to be accessed by industry for identifying opportunities and impediments to the uptake of online technologies;
- assisting industry associations to promote online technology among their members, including organizing and conducting workshops;
- developing national competency standards in online technologies
- developing a set of guidelines for minimum infrastructure needs for online business practices;

- monitoring and providing information about tax and legal issues relating to online tourism initiatives; and
- undertaking applied research and data gathering about the most effective online strategies for SMTEs.

While the resource centre will be online, it will have to be supported by considerable offline activities in its initial phases.

Web 2.0 brings a second generation of opportunities for collaboration and information sharing based on web-based communities and hosted services. For tourism the benefits include enhanced information sharing between consumers and between business and consumers. The Web gives tourist firms and organisations the ability to reach highly motivated customers with information-rich messages at a negligible cost. Nevertheless, competitive advantage on the Internet will not be realized by applying existing marketing models but, rather, by developing innovative concepts. Integrated approaches that build on the advantages and capabilities of technology need to be translated into concrete innovative marketing actions. The Internet, Dogac, et al (2004) argues, enhances the level of collaboration between tourist operators and brings about greater levels of interoperability with internal and external applications, previously available to technologically advanced tourism stakeholders via proprietary systems.

4. CONCLUSIONS

The emergence of innovative Web-based technologies has led to a reconfiguration of the environment in which tourism business is conducted. These fundamental technological shifts have a profound impact on the perception, consumption and construction of tourism spaces, and their local development outcomes. 'Traditional' regional communities have new tools through which to disseminate their concerns, and may, via global networks, gain new 'community members' that can represent their interests around the world (Gurstein, 2000; Rheingold, 2000). As Zeldin (1994:467) notes, the Earth is being 'criss-crossed afresh by invisible threads uniting individuals who differ by all conventional criteria, but who are finding that they have aspirations in common'. Understanding these changes is crucial for creating a vision in the tourism organization that things are going to evolve.

Tourism leaders need to convince stakeholders to come along on this move toward innovative strategies, knowing that it will cost money, require a lot of training, and take time. The problem with many current online tourism strategies is that organizations try to fit everything into existing structures and models. The co-evolution of innovative Web based technologies and communication strategies will lead to a quantum change in the way business is conducted, from business to consumer, from business to business, and internally. Understanding the medium, the customer, the business, and partners seem to be the key variables for the successful integration of ICTs in regional tourist development.

Understanding usually comes from knowledge. Since no expertise is readily available, learning, collaboration, and the active sharing of online experience become extremely important in the process of knowledge creation. Only DMOs and other tourist stakeholders with an ability to learn quickly and to translate that learning into action rapidly will be able to gain competitive advantages in these high velocity marketplaces.

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*STRATEGY IN TRADITIONAL RESTAURANTS.
ANALYSIS AND EVALUATION OF MENUS AT
FOOD SERVICE OUTLETS*

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ABSTRACT

Background: By the registration and analysis of the Greek menus, by the finding of the menus' important features, and by the analysis of the menu-items that more frequently appear in Greek catering businesses, we can have the profile of the typical menu in a Greek restaurant, for historical, traditional and nutritional researching purposes.

Methods: On the whole, 502 menus out of 502 catering businesses were chosen throughout Greece. The research was divided into six parts, which concern the registration and the analysis of the names of the businesses, the different types of the businesses that took part in the study, the menu-categories and the menu-items, the nutritional and gastronomical comments on some of the most frequently appearing menu-items and finally, the creation of the profile of a typical menu.

Results: Some of the most important results are that 600 single words derive from the names of the businesses, 489 different words that compose the menu-categories. From the results of the menu-items' analysis, 2033 single words were appeared. The 10 most common of them, which describe dishes are: feta cheese (934 occurrences), shrimps (703), mushrooms (702), fried cheese (saganaki) (595), burger (570), souvlaki (535), octopus (409), sausage (395), Greek salad (choriatiki) (391) and wine (382). 22 menu-items, 3 alcohol drinks and 3 desserts, were chosen in order to be commented.

Conclusion: The current study could improve the procedures of writing a menu, as an important process of the Ho.Re.Ca. Sector. The catering businesses show variety in the businesses names, but they seem to keep a specific strategy on writing a menu, such as specific word profile and menu-categories number. Furthermore, it is interesting that some elements and menu-items, from foreign cuisines, seem to have been deeply embedded in the Greek gastronomy. Additionally, it seems that dishes with meat maintain a great percentage on a menu. Eventually, a model profile of the Greek menu was created upon the afore mentioned data analysis. However, more research in this topic is recommended, by taking into consideration some other aspects of this one.

Key Words: menu, menu-item, dish, restaurant, gastronomy

INTRODUCTION

Tavern; The traditional Greek restaurant

There are many different definitions that explain the word "Tavern". It is the restaurant that usually offers cheap food, meat or fish and wine (Iordanidou, 2007). Otherwise, tavern is a small Greek restaurant or café (Simpson & Weiner, 2012).

The origin of the tavern appears 2500 years ago. It was first appeared in the Ancient Athina with the name of "kapilio" or as an inn. The definition of "tavern" first used on the 13th centuries in Istanbul with the beginning of the Frankish (Pittas, 2009). Taverns and inns had an important role in the History of Culture, because they were used as way of the society's relief (Lundberg, 1997). In general, the Greek tavern changed throughout the decades, in parallel with the historical changes in Greece and particularly in Athens (Pittas, 2009).

Tavern is divided into several categories. Fish-taverns offer fish dishes usually accompanied with alcohol drinks. Grill houses offer meat or chicken dishes accompanied or not with drinks. Souvlaki-taverns roast small pieces of meat in order to prepare the typical Greek souvlaki (Laloumis & Stefanakidis, 2005).

A usual tavern menu consists of:

Bread (usually sliced), salads (most frequently Greek salad or seasonal greens), meze or appetizers (such as: tzatziki, dolma, spinach pie, saganaki-fried cheese), pulses, spaghettis, fish and seafood, cooked dishes, grilled dishes, wine, beers, other alcohol drinks, such as ouzo and tsipouro, seasonal fruits and desserts (such as yogurt with honey, preserves sweet, halva).

There are some trademarks and certifications, for the quality assurance of the quality of Greek

Cuisine in catering businesses and of general rendering of services; "Greek Cuisine" trademark of the GNTOT¹, "Cretan Cuisine Quality" trademark, "Gourmet" award, "Golden Chef's Hat" award (Boskou & Palisidis, 2012).



Picture 1: "Greek Cuisine" trademark, "Cretan Cuisine Quality" trademark, "Gourmet" award, "Golden Chef's Hat" award

As it is mentioned above, tavern is the traditional restaurant of Greece. Respectively, "konoba" is the Croatian traditional restaurant, "osteria" and "trattoria" are the Italian traditional ones, "tapas bars" and "el restaurantes" are the Spanish traditional ones and "brasserie" and "roisserie" are the French traditional ones.

The role of taverns in Greek tourism

Tourism is a very widespread way of entertainment, as well as a part of a big industry and an important financial source for traditionally tourist countries, such as France, Spain, America, Italy, Cuba and Greece (Boskou & Palisidis, 2012). Food is an important tourist attraction in an assortment of forms and enhances or is central to the visitor experience. It has assumed a prominent role in tourist decision-making and satisfaction, tourism products and place promotion strategies. As such, it can be a useful instrument of destination and

¹GNTOT: Greek National Tourism Organization

general development. Tourists and the tourism industry around the world thus share an interest in food, although certain concerns must be addressed to ensure visitor expectations are met and perhaps exceeded (Henderson, 2009). Food and tourism have a very close relationship and food is a critical tourism resource (Quan & Wang, 2004; Henderson, 2009). It is vital for physical sustenance and all tourists have to eat when travelling. But food can be a major draw and primary motivator for some, which satisfies a multiplicity of physiological and other needs and wants (Tikkanen, 2007; Henderson, 2009). With regard to benefits, food offers pleasure and entertainment and serves a social purpose. Dining habits can also afford insights into ways of life (Bell & Valentine, 1997; Henderson, 2009) helping tourists understand differences between their own culture and those with which they come into contact (Hegarty & O'Mahoney, 2001; Henderson, 2009).

In Greece, tourism contributes to the local economy, providing 15% of the GDP². There are more than 9700 hotel establishments and 115000 catering businesses, thus the tourist Sector is one of the major financial sources for Greece (SETE, 2011). Tourists come in contact with Greek cuisine throughout hotels, and afterwards throughout Greek restaurants and taverns.

Taverns prepare meals from mediterranean ingredients. The Mediterranean Diet based on simple food preparation, offers delicious dishes because of the wide range of mediterranean products (Willet *et al*, 1995). Hence, Greek tavern is an integral part of a tourist visit in Greece.

Studies Review

In recent years, many research has been conducted, concerning outdoor food consumption. In fact, food consumption in restaurants and other catering businesses seems to have been increased later (Kant & Graubard, 2004; Horizons FS Limited, 2012). The increased outdoor food and fast-food consumption is associated with an increase in obesity percentage, because of the high-calorie meals that the food catering businesses usually offers (Lachat *et al*, 2011; Bezerra *et al*, 2012). As far as the menus' content are concerning, it seems that when businessmen design their menu-pricelist, they give priority to the profit margins than to health and nutritional issues (Granz *et al*, 2007). In another research, they studied the energy and nutritional content of some menus of a food chain restaurant. The results indicated that appetizers had more energy, fat and sodium than all other item types. The majority of main entrees fell below one-third of the US Department of Agriculture's estimated daily energy needs, but as few as 3% were also within limits for sodium, fat and saturated fat (Wu & Sturm, 2012).

² Gross Domestic Product

Necessity and Purpose of the research

As a result from the above bibliography and studies review, there is a need to analyze the menus of the traditional Greek restaurants for two main reasons. A menu represents an important part of a business' profile and operation, thus it is important to study the features and key-points that businessmen give priority to when designing a menu. From these results we can have an idea about what customers need from a food menu, because of the Supply-Demand Law. Hence, we can come to a conclusion about the potential outdoor food choices of the Greek, that this concerns the Science of Nutrition, as well the potential food choices of tourists, that this concerns the Tourism Industry and the Ho.Re.Ca. Sector.

The aim of the research is the registration and the analysis of the Greek menus. Particularly, we registered and analyzed the menus into menu-categories, as well as we analyzed the menus into menu-items. By the registration of the menus, by the finding of the menus' important features and the results of the analysis of menu-categories and menu-items that most frequently appeared, we can have the profile of the typical menu in a Greek restaurant, for historical, traditional and nutritional researching purposes.

METHODS

Selection Criteria

For the current research, we collected data with some criteria. We choose catering businesses that:

- I. Are Greek firms
- II. Have typical Greek Cuisine and Greek dishes. Ethnic restaurants, pizzeria, fast-food restaurants and fast-food chain restaurants, souvlaki restaurants, grill houses and creperies are not included.
- III. Coffeeshops and bars that do not offer any kind of meals are not included. On the contrary, café-restaurants, snak-bars and wine-bars are included in the sample.
- IV. The full menu-pricelist is available to us. We do not include menus that are not completed.
- V. Their menu is available at least in Greek language. Menus of Greek restaurants that are not available in Greek are not included.
- VI. Have fixed a la carte menu. Table d'hote menus, buffet menus and restaurants without a fixed menu are not included.
- VII. Coffeeshops and bars that do not offer any kind of meals are not included.

As far as

We selected our data from the Internet, from business sites, web pages related to catering businesses and web pages with special offers for restaurants and catering businesses in general. Also, we select data directly from businessmen, either by asking the menu by email or by taking photos and copies of the menus.

We collected data throughout Greece. The number of the selection data in each prefecture is mentioned below:

Evrou	3	Larissa	26
Rodopi	1	Magnisia	6
Ksanthi	8	Euritania	0
Kavala	29	Aitoloakarnania	1
Drama	6	Fthiotida	7
Serres	8	Fokida	10
Thessaloniki	18	Viotia	3
Halkidiki	20	Evia	0
Kilki	1	Attica	70
Pellas	2	Korinthos	3
Imathia	5	Argolida	47
Florina	6	Achaia	20
Kastoria	21	Ilia	15
Kozani	4	Arkadia	3
Pieria	15	Lakonia	5
Grevenon	5	Messinia	6
Ioanninon	6	Cyclades	42

Thesprotia	1	Lesvos	3
Corfu	2	Chios	3
Leukada	2	Samos	5
Keffalinia	1	Dodekanisou	7
Zante	0	Lasithi	6
Preveza	3	Heraklion	3
Trikalon	11	Rethimno	7
Arta	3	Chania	2
Karditsa	1		

Table 1: Number of the selection data in each prefecture in Greece.

The final sample consists of 502 menus out of 502 catering businesses throughout Greece.

Analysis of the data

The programs, which are used for the analysis of the data, are: Excel (MS Office), Calc (Open Office) and Online Text Analyzer, a java application from the <http://www.online-utility.org/text/analyzer.jsp> website. The last one can analyze a text into the frequency that each work of the text appears in it. It also analyzes a text into 2, 3, 4, 5, 6 and 7 word phrases that appear most frequently. The results of the Online Text Analyzer are presented into tables, for each number of word phrases, separately.

Firstly, businesses names are analyzed by the Online Text Analyzer, in order to find which words are usually used for a Greek catering business name. To continue with, we analyze the businesses categories that took part in the research, in order to have participation's percentage for each business category. The analysis is conducted with filters of Excel Sheet of MS Office. Then, we analyze the menus into menu-categories. We first put the data into an Excel Sheet: we register the business' name, the city or town the prefecture that each establishment is located, the number of menu-categories that each menu obtains and the menu-categories of each one, particularly, in order to be analyzed. We made arithmetic analysis of the number of menu-categories that the menus obtain, by using

Excel Sheet of the MS Office. The next analysis has to do with the characterization of the profile of the words that are used for the menu-categories. 17 different word characterizations were used. Thereafter, the menu-categories are analyzed according to special categories, such as “regimen” category. The language of the words of menu-categories is also registered. Then, a two-word combination is made between the words that appear most frequently in menu-categories titles, in order to find the probability to appear together on a menu.

In the next part, the menu-items of menus are analyzed by Online Text Analyzer. Some spelling and syntax correction, as well as replacements of words with the same meaning, were necessary in order to be finally analyzed. The initial word number is 10481 words, but because of the dish-codification, the final one is 9996 words. The final sample of the menu-items is a Word Sheet of 558 pages.

From the last analysis, the most frequently appeared dishes come off. Some of them are commented nutritionally and gastronomically. Finally, the most frequently appeared menu-categories and menu-items are used to design the typical Greek menu.

Results

Most common name for a catering business is “steki” that means «hang out», with 8 appearances. Other common names are “geuseis” that means «flavors», “maistrali” that means «mild wind», “petrino” that means «stony» and “acrogiali” that means «seashore», with 4 appearances. Also, the word “hotel” appears 7 times, which means that businessmen give special name indication concerning hotel restaurants. Finally, 600 name words come out of 502 businesses in total, which explains that there is variety throughout businesses names. Businesses names, which appear more than 3 times, are mentioned below:

<u>Order</u>	<u>Words</u>	<u>Appear.</u>
1.	to	55
2.	o	36
3.	restaurant	25
4.	η	16
5.	τα	15

6.	του	10
7.	στέκι	8
8.	της	8
9.	ταβέρνα	8
10.	εστιατόριο	8
11.	και	7
12.	hotel	7
13.	ουζερί	5
14.	μας	5
15.	taverna	4
16.	la	4
17.	στο	4
18.	γεύσεις	4
19.	μαϊστράλι	4
20.	πέτρινο	4
21.	ακρογιάλι	4
22.	η'	3
23.	φάρος	3
24.	thalassa	3
25.	κουζίνα	3
26.	κληματαριά	3

27.	bar	3
28.	and	3
29.	golden	3

Table 2: Businesses names results

35 different businesses categories derive from the research. It is important to mention that the typification of the business category was made by each businessman themselves. 171 out of 502 businesses are characterized as “restaurants” and 148 out of 502 are characterized as “taverns”.

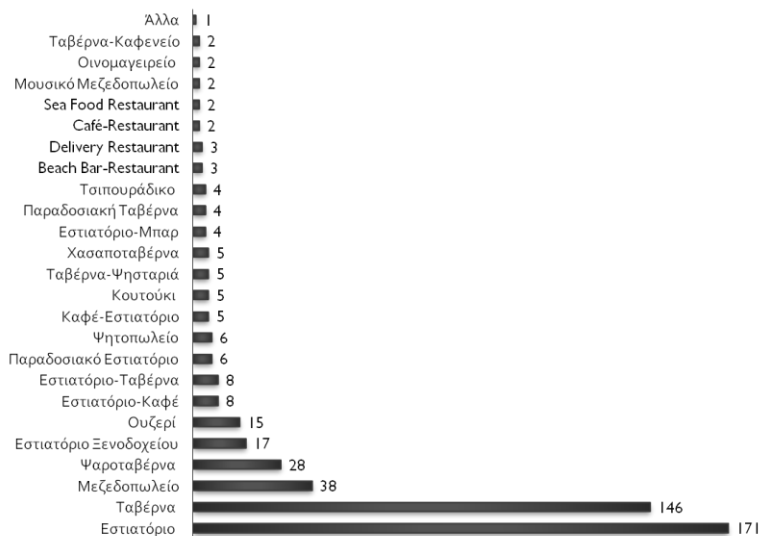


Figure 1: Businesses categories results

It is important to keep in mind that, businesses categories results, possibly, influence menu-items results.

The results of the most appeared menu-categories are below. This table consists of the results that have more than 20 appearances into the sample.

<u>Or.</u>	<u>Words</u>	<u>App.</u>			
1.	appetizers	469	27.	white	55
2.	salads	455	28.	cold	48
3.	wines	232	29.	warm	44
4.	refreshments	189	30.	meats	42
5.	dishes	166	31.	rouge	38
6.	beers	149	32.	pasta	36
7.	desserts	142	33.	cooked in oil	35
8.	of (her)	140	34.	tsipouro	34
9.	seafood	140	35.	risotto	33
10.	cheese	123	36.	cuisine	31
11.	cooked to order	118	37.	of the day	30
12.	drinks (pota)	118	38.	wine	29
13.	fish	111	39.	specialties	29
14.	spaghetti	106	40.	pizzas	28
15.	entrees	101	41.	retsines	27
16.	sweets	95	42.	varieties	27
17.	grilled	88	43.	for	26
18.	ouzo	78	44.	us	25
19.	and	75	45.	pies	24

20.	cooked	70	46.	fresh	24
21.	soups	67	47.	omelets	22
22.	meat food	65	48.	spit	22
23.	coffees	64	49.	carbons	20
24.	meze	59	50.	fried	20
25.	roasted	56	51.	drinks (rofimata)	20
26.	red	55	52.	special	20

Table 3: Frequency of menu-categories

In total, 489 different words results from the menu-categories analysis. 243 out of 489 words appear more than 2 times in the sample.

<u>Number of Categories</u>	<u>Number of menus with the particular number of categories</u>
6	60
5	58
4	57
7	52
8	46
3	41
9	33
10	31

11	29
13	23
14	14
12	11
16	10
15	8
21	5
19	5
17	5
2	5
23	3
20	3
24	2
18	1

Table 4: Results of the arithmetic analysis

As far as the arithmetic results are concerned, the minimum number is 2 categories and the maximum one is 24 categories. 80%, of the menus, consists of 3 to 11 categories. On the other hand, 20%, of the menus, consists of: 2, 12, 13, 14, 15, 16, 17, 18, 19, 20, 21, 23, 24.

The characterization of the profile's words, that consist the menu-categories, is completed in 17 different ways. Finally, the main percentage of the word-profile was characterized as «categories» (38.2%) and the second biggest one as «subcategories» (26.6%).

Order	Categorization	Appearances	Percentage
1.	category	232	38.1579
2.	subcategory	162	26.6447
3.	characterization	75	12.3355
4.	dish	57	9.3750
5.	drink	17	2.7961
6.	clause	14	2.3026
7.	adverb	10	1.6447
8.	verb	9	1.4803
9.	quantity	7	1.1513
10.	drink	5	0.8224
11.	location	4	0.6579
12.	number	3	0.4934
13.	conjunction	3	0.4934
14.	preposition	3	0.4934
15.	pronoun	3	0.4934
16.	letter	3	0.4934
17.	ingredient	1	0.1645

Table 5: Results of word profile analysis

Special categories results indicate that Greek businesses seem to rarely offer these kinds of food- categories. To be more specific, only 1.6% out of 502 menus has a special category as well as 8 words out of 489 consist a special one.

<u>Special Categories</u>	<u>Appear. Number</u>
Regimen	2
Diabetic	1
Fasting	2
Vegetarian	3

Table 6: Special Category Results

The majority of the words that are used in menu-categories have Greek origin (87.1%). However, there is an important percentage of other language on the origin of some words (12.9%). It seems that is quite usual to use foreign words in Greek menus.

Order	Word Language	Appearances	Percentage
1.	Greek	426	87.1166
2.	other	63	12.8834

Table 7: Language of menu-categories

From the law of averages, the combination of «salads-appetizers» and «appetizers-salads» have the biggest probability to appear together in a menu-category-title (0.68% percentage).

As far as the menu-items are concerned, the most common ones are appeared below:

feta cheese	934	sauce (with..)	264	vinegar	150	broccoli	113
shrimps	703	olives	257	tomato sauce	149	with honey	113
mushrooms	702	pork chop	249	oregano	148	dolma	112

fried cheese	595	spaghetti	248	salmon	148	with cheese	108
beef steak	570	cola	244	shrimps fried cheese	148	with ice cream	106
souvlaki	535	squid	233	patatosalata	143	grilled	105
octopus	409	meat balls	230	risotto	143	salad (with..)	103
sausage	395	from tomato	228	fava	143	virgin olive oil	102
choriatiki	391	anchovy	227	with sauce	140	(cooked) in the oven	99
wine	382	coca cola	225	kebab	138	chef's salad	92
tzatziki	352	Greek salad	200	sardine	138	staffed with	87
French fries	345	florina	167	baked cheese feta	138	fried zucchini	87
Chicken fillet	341	chicken with	166	sepia	130	with tomato	85
tenderloin	332	pork souvlaki	163	moussaka	122	chef's	84
with sauce	324	beef steak	162	hooch	121	with mushrooms	81
ouzo	310	tsipouro	160	ntakos	119	with sauce from	81
zucchini	300	tirokafteri	160	butter bean	116	salad of	79
mussels	297	aggourotomata	157	sour cream	116	salt pepper	70
greens	294	cod	157	swordfish	115	chop pork chop	63
ribs	291	tomato and	154	taramosalata	115	beef steak staffed	52

veal (chop)	279	chicken souvlaki	153	zucchini balls	114	pork chop veal	52
lamb	267	barbecued	152	orange juice	114	a la crem	51
ice creams	265	braised	151	soda	114	yogurt with honey	51
						pork chop veal chop	50

Table 8: Most common menu-items

The above results are mentioned to the one word results that appear more than 110 times and to the 2, 3, 4 word phrase results that appear more than 50 times (according to Greek words results).

According to the above mentioned results, 22 dishes, 3 Greek alcohol drink and 3 desserts are chosen and commented nutritionally and gastronomically.

Creation of the typical Greek menu

According to results of the research, the indicated menu-category number is 6 categories, because the greater percentage of the menus obtains this number. We choose the 10 first results of menu-categories and we combined them into pairs. Finally, we create 6 menu-categories for the typical menu. However, it is necessary to add the “drink” category in the “refreshments-beers” one. To continue with, we decided to include single word dishes and 2, 3, 4 word phrase dishes that appear more than 50 times and desserts with over than 30 appearances. We do not include the “fish” category because it is not a priority according to results, but it is a necessary category when we refer to fish-tavern. The Typical Menu is presented to a lesser order:

Conclusion

The registration and analysis of the Greek menus interests the Greek Tourism Sector. In this research, we study the Indirect Demand. Lots of similar researches could be conducted in order to study the Law of Supply-Demand and to improve the writing processes of menu, which is an important marketing part of a catering business. Nowadays, menu is more important than before, especially for businesses that have websites. In this case, customers firstly come into contact with the menu and afterwards with the space of restaurants and the staff. Also, throughout this study, we end up to some

probable outdoor nutritional choices for Greeks. This part of the study has a great scientific interest for the Science of Nutrition.

Appetizers-Salads:

Feta cheese
Mushrooms
Saganaki
Octopus
Sausage
Tzatziki
French fries
Mussels
Olives
Meatballs
Anchovy
Cuttlefish
Skordalia
Graviera
Tigania
Kefalotiri
Florina
Tirokafteri
Shrimps fried cheese
Risotto
Fava
Sardines
Sepia
Ntakos
Butter beans
Zucchini balls
Dolma
Cheese pie
Kaseri
Livers
Cheese croquettes
Mashed potatoes
Mushrooms

Bougouri
Fried zucchini
Beans
Scampi
Omelet
Bekri (meze)
Tuna
Bourekakia
Mullet
Green beans
Smelt
Soup
Flogeres
Fish-soup
Toursi
Choriatiki
Greens
Eggplant salad
Beet salad
Lettuce salad
Aggouro-tomata
Potato salad
Tarama salad
Broccoli
Tuna salad
Chef's salad
Caesar's
Cheese salad
Cauliflower salad
Coleslaw
Russian

Cooked to order:

Beef steak
Ribs
Pork chop
Cuttlefish
Pancetta
Souvlaki pork
Veal chop
Souvlaki chicken
Haddock
Kebab
Hooch
Swordfish
Gyro
Kontosoufli
Barbel
Bass fish
Mackerel
Kokoretsi
Sole
Tope
Sea bream

Main dishes:

Chicken fillet
Tenderloin
Lamb
Pasta
Meatballs
Schnitzel
Soutzoukakia
Red meat
Salmon
Moussaka
Carbonara
Stifado
Napolitana
Giouvetsi
Lobster
Pasticcio
Pesto
Pizza
Cockerel
Bolognese
goat
Shrimp spaghetti
Rabbit
Mpriam
Gumbo
Souffle

Refreshments-Beers-Drinks:

Cola
coca cola
Orange juice
Soda
Sprite
Lemon juice
fanta.

Heineken
Amstel
Kaiser
Mythos
fix

Ouzo
Tsipouro

Wines:

wine (white-red-rouge)
retsina

Desserts:

Ice-creams
Halva
Yogurt with honey
Pecan pie
Kadaifi
Baklavas
Panacotta
Ravani
Crepe
Fruit salad
Mousse
Custard filled pastry
Sweet preserves
Millefeuille

To be concluded, businessmen use a variety of words for their businesses names, which is also a marketing part of a business. Also, 80% of the menus have 3 to 11 menu-categories, a limited number, maybe in order to facilitate customers' choices. Furthermore, the main language of a catering business' menu is Greek. There is a small but remarkable tendency for foreign languages to embed into Greek gastronomy. As far as special categories are concerned, regimen, diabetics, vegetarian and fasting categories are the great minority of them. That may be cause there is a limited demand for that kind of categories, or else businessmen do not want to invest money in order for this categories to be included in the menus.

Results, from menu-items, reveal some interesting key-points for a catering business. In the first 80 words, we can find 16 red meat dishes, 7 fish and 6 seafood ones. This could play an important role on how much Greek people prefer red meat than other kind of animal protein. Moreover, in the first 80 dishes, we find 10 salads and specifically Choriatiiki (Greek salad), greens, egg plant sauce, beet salad, lettuce salad, cucumber-tomato salad, potato salad, broccoli salad, tuna salad, ceasar's. In the first 80 words, the alcohol drink that appears most frequently is wine, followed by ouzo, tsipouro, beer and retsina. The most frequently appeared dessert is ice-cream, followed by halva and yogurt with honey, as well as the most frequently appeared coffee is espresso, followed by cappuccino and frappe. Greek coffee appears significantly fewer times than espresso. Finally, we have to underline that in the first 120 dishes, we find 11 ethnic foods (Turkish, Italian, American, and Russian). It seems that there are many foreign elements that have been penetrated into Greek gastronomy.

Limitations

Data Analysis Program: "Online Text Analyzer" could be replaced from another tool that will not create confusion of certain single words. Because of that, we may have interpreted wrongfully some dishes. However, we corrected the confusion to a great extent by using the 2, 3, 4, 5 word phrase tables of the Program. Furthermore, the different business categories do not equally take part in the research. This might have influence some results, especially for the most frequency appeared menu-items. Finally, we missed some data, because of the exclusion of Greek catering businesses that were available only in foreign languages. We recommend further research in this topic, taking into consideration all the limitations that have mentioned.

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SUSTAINABILITY AS A KEY TO THE FUTURE FOR ST. THOMAS, UNITED STATES VIRGIN ISLANDS

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ABSTRACT

St. Thomas, United States Virgin Islands is a 31 square mile island in the Caribbean Sea, situated at the northern end of the Greater Antilles (VI Now, 2013). Home to roughly 51,000 residents, St. Thomas hosts millions of air and water guests each year (Central Intelligence Agency, 2004). Tourism is the main source of income for the island and is the largest employing industry (Central Intelligence Agency, 2004). Yet since its boom as America's tropical paradise in the late 1960's, very little tourist related infrastructural renovations have been made to the island, taxing the island's already limited resources. Furthermore, the intersections of socioeconomic status, ethnicity, and colonial history of the local population stand in sharp contrast to the tourists', exacerbating a bittersweet relationship between residents and tourists. These factors maybe a hindrance to the full development of tourism in St. Thomas. Improving tourism infrastructures and collecting input from both community residents and tourists on tourism initiatives may hold the key for improvements of St. Thomas's tourism future. This paper proposes conducting a quantitative study surveying tourists and local residents on their perspectives of tourism in St. Thomas. The results of such a study may be used for local government, the Department of Tourism, non-profit agencies, and others involved in the tourism industry to implement infrastructural improvements and sustainable tourism initiatives.

Key Words: St. Thomas, USVI, sustainability, tourism

1 INTRODUCTION

St. Thomas, United States Virgin Islands (USVI), a small 31 square mile rock island in the northern Caribbean Sea, is known as America's tropical paradise boasting pristine beaches, romantic wedding packages, and accommodating family resorts (United States Virgin Islands Hotel and Tourism Association, n.d.). Home to approximately 51,000 residents, not including the influx of seasonal workers and undocumented residents, this island is somewhat mainland U.S.A. in its demographic mix and mainland amenities, while very Caribbean with its limited resources and dated public infrastructures (VI Now, 2013; Central Intelligence Agency 2004). St. Thomas is also considered the most culturally diverse island in the Caribbean, particularly when millions of annual tourists breach its shores (United States Virgin Islands Demographics, n.d.). The addition of hundreds of tourists daily creates a heavy demand on limited island resources like water, electricity, gasoline, and even space. The beaches and waterways surrounding the island also pay a heavy price in human traffic since these are prime tourist destinations.

As an island heavily dependent upon tourism, the addition of so many tourists daily adds a strain to the tourist/resident/environment relationships as evidenced by the consistently low rankings in customer service and island cleanliness assessments on guest surveys (Bureau of Economic Research, 2005). It may be that the underdevelopment of tourism related infrastructures plays a part in how local residents interact with tourists and how both tourists and residents interact with the environment. When developing sustainable tourism initiatives, these may be factors necessary to consider.

Aligning with the Virgin Islands Department of Tourism's goal of including community input on tourism plans, this paper seeks to assess the relationships local residents have with tourists and the environment to provide valuable information for sustainable tourism initiatives (Lewin, 2012). The methodology chosen for this research is quantitative whereby the researcher will utilize questionnaires for both tourists and local residents as the data collection tools. Findings of this study may be instrumental in mapping sustainable development options for not only tourism, but also other aspects of island life like environmental conservation, public works, and economic and social development plans.

2 LITERATURE REVIEW

Researchers Dunn and Dunn (2002) conducted a similar study in Jamaica for the purpose of enriching Jamaica's hospitality industry. Recognizing the growing economic importance of tourism for the island, Jamaica's department of tourism realized it needed to establish a niche within the Caribbean tourism sector. Seeing its people as the distinguishing factor of the island over the physical nature of the island, Jamaica realized

their customer service must be their point of demarcation. "For people to be happy with visitors, they have to be happy within themselves and their social environments", Dunn and Dunn reported (2002, p. 26). These authors reiterated residents' sentiments regarding the need for improvements in the hospitality workers' arena, specifically a need to improve workers' housing and transportation options. Also recognized was a need to improve the relationships between locals and tourists via reducing the resentment between the wealthy tourists and the poor residents. Like Jamaica in Dunn and Dunn's 2002 study, St. Thomas's tourism industry is currently at a pivotal point facing very similar dynamics. With the closure of the largest private company in the territory, tourism is now this island's main income source. Therefore, feedback from both resident and tourist populations are essential components for future tourism initiatives in St. Thomas.

Walmsley and Jenkins's (1993) research examined tourists' and local residents' perspectives in Australia. Using social construct theory, these researchers found that tourists' perspectives of each tourist destination were relatively the same among themselves regardless of sex and age, but differed when compared with local residents' perspectives. These researchers wanted to determine what constructs tourists used to differentiate between tourist areas. Understanding the importance of human perception as it relates to their environment "has led to a resurgence of interest in 'cultural geography' and [challenged us] to focus on how environmental meaning is contested and negotiated" (Walmsley & Jenkins, 1993, p. 2). Likewise, the St. Thomas proposed study would assess tourists' perspective of St. Thomas to see how they relate with local residents' perspectives of St. Thomas. The Walmsley and Jenkins' (1993) study provided valuable information particularly for the tourism marketing industry. These businesses were able to work with how tourists viewed each particular location to create marketing strategies that reinforced the tourists' perspectives. Both the Department of Tourism and Hotel and Tourism Association in St. Thomas recognize the need for St. Thomas to develop its own niche in the Caribbean tourism sector. Assessing tourist and local resident perspectives on St. Thomas tourism would be useful in determining an appropriate niche, which could then be utilized for marketing initiatives.

When dealing with the human factor of tourism, there are many overlapping aspects to consider. In St. Thomas, the colonial history of the island, the high cost of living, low average household income, and its patriarchal culture all factor into how local residents and tourists interact (USVI Moving Center, 2012; Bureau of Economic Research, 2012; U.S. Census Bureau, 2002; de Albuquerque, 1999). Recognizing that tourism perpetuates gender and ethnic inequalities, it is not surprising that most front line service positions like hotel front desk staff, servers, and cashiers/clerks are positions occupied by females and are among the lowest paying jobs (Virgin Islands Department of Labor, 2011; Bailey & Ricketts, 2003; Massiah, 1982). One can deduce that this intersection is where most of the negative interactions between guests and tourists occur.

The two largest resorts on St. Thomas confirm that guest satisfaction rankings can be improved by improving guest/staff interactions, which may mean improving the value or worth of the front line employees. One example is the Marriott Frenchman's Reef and Morning Star Resort, continually the company's biggest earner worldwide, yet with the lowest guest satisfaction rate within the entire Marriott Corporation (personal communication, 2013). Based on their Guest Satisfaction Survey and Trip Advisor responses many guests' overall experiences were less than satisfactory citing poor customer service and uncleanness of the island as two most reported complaints (personal communication; Bureau of Economic Resource, 2005; Trip Advisor, 2013). Another example is the Ritz-Carlton of St. Thomas, also continually low ranking in guest satisfaction relative to other Ritz hotels in the region (personal communication, 2013). Assessing worker's attitudes and their perspectives of tourism may be the key to improving tourist and worker interactions, which would not only help these particular hoteliers, but also the island's economy.

3 THEORY

The frustration/aggression theory may be an appropriate lens through which to frame the resident/tourist dynamics. According to this theory, workers may be frustrated because of their low wages and/or low worth to their place of employment. Feelings of frustration can turn to acts of aggression, passive or active, when they are not acknowledged, validated, or managed in socially acceptable ways. As this theory states "the more directly the target of our aggression is associated with the frustration, the more effectively is the tension released" (Schellenberg, 1996, p. 51). This reality has the potential to cause turbulence in not only the workplace, but in the greater community, which according to Tilly (2003) is a prime ingredient for civil discontent. Societies where certain populations' basic needs are not met or are denied risk violent outbursts from those populations (Burton, 2006). Greece's April 18th, 2013 strawberry shooting case exemplifies this very point (Labropoulou, 2013).

There is a sizable West Indian population in St. Thomas, many who migrated to the U.S. Virgin Islands for work and a better quality of life. Differentiating West Indians from St. Thomians, de Albuquerque and McElroy (1982) elaborate, "Although their impact on the delicate insular social and demographic fabric has been substantial, the West Indians' assimilation has only been partial as evidenced by insecure legal status, persistent job and wage discrimination, grudging social acceptance and political disenfranchisement" (p. 96). This social dissonance still exists in St. Thomas today as many West Indians work in the tourism industry, possibly explaining some of the negative tourist/local interactions (personal experience, 2006).

This dissonance may also explain St. Thomas's violence. Rated one of the deadliest places in the world for murders per capita, St. Thomas has its social challenges

(Mattei, 2013a; Shea, 2012; Mortenson, 2010). Island violence certainly does not facilitate a successful tourism campaign particularly when violence spills over into the tourism sector, like when a 16 year old cruise ship day guest was gunned down by gang cross fire in 2010 (Sloan, 2010). Social ills such as this exemplify the need for St. Thomas's tourism industry to become directly involved in the health and well being of the local community.

4 ENVIRONMENT

Violence against the environment is also a major concern for St. Thomas's tourism industry. As an often-reported disappointment mentioned by tourists, cleanliness of the island is an area identified for improvement (Bureau of Economic Research, 2005). Litter lined roads is reflection of ecocide, a society's conflict against the environment. This term, ecocide, is defined as "The extensive destruction, damage to or loss of ecosystem(s) of a given territory, whether by human agency or by other causes, to such an extent that peaceful enjoyment by the inhabitants of that territory has been severely diminished" (McClellin, 2012). This term can be viewed as fitting for St. Thomas for several reasons highlighted below.

St. Thomas's garbage collection system is such that it requires residents to dispose of their waste at various dumpsters located around the island along the major roadways. Most of the garbage makes it into these dumpsters, but not all. Around any one of these dumpster areas one can find old refrigerators, tires, televisions, batteries, and various other toxic materials. Often times the garbage bins and dumpsters are overflowing with the grounds around them absorbing hazardous material residue jeopardizing the long-term health of the environment.

Another major area of concern jeopardizing the long-term health of the island is the end location for all the island's garbage. There is only one landfill for the garbage of three of the four islands of the territory and all their tourist guests. The unlined, shoreline landfill in St. Thomas accommodates millions of people's garbage each year (Parten, 2013; Baur, 2010). It is consistently in violation of polluting the environment, costing the territory millions of dollars in fines (Environmental Protection Agency, 2008). The dearth of recycling facilities is a contributing factor to the landfill problem, resulting in batteries, refrigerators, motor oil, etc. to be tossed into the landfill, bush, or ocean (Mattei, 2012; Environmental Protection Agency 2008). Furthermore, the practice of live-aboard boats dumping raw sewage in the marinas and the open ocean is another major offense against the environment directly affecting coastal coral life (Department of Planning and Natural Resources, 2005). Despite the large marina industry in St. Thomas, there are no holding facilities in place for boats to deposit their raw sewage; therefore, boats empty their waste directly into the ocean (Parten, 2013; Department of Planning and Natural Resources, 2005). Raw sewage dumped into the ocean creates eutrophic conditions known to cause algae blooms, which suffocate coral life. Over the years, much of the coral

around St. Thomas has died. The Resident Questionnaire will assess knowledge and awareness of environmental issues pertaining to the above raised topics. Understanding the importance of environmental cleanliness to tourists and whether or not it is important to residents will be an outcome of this study. Answers to the survey questions can help key tourism industry entities tailor their tourism initiatives towards addressing the environmental concerns raised by previous tourists.

5 TOURISM INFRASTRUCTURES

Understanding that there is a connection between private and public tourism related sectors, it is known that private sector entities will be hesitant to invest in or support tourism infrastructures if public infrastructures are not adequate. Defining tourism related infrastructure as those services and facilities that service tourists needs and encourages private sector investments in competitive tourism products, it is paramount that public sector infrastructures in St. Thomas operate affordably, efficiently, and effectively if private sector support is desired (Tourism Western Australia, n.d.; Oliconography on Social Infrastructures, n.d.). Examples of public sector tourism infrastructures include roadways, airports, ports, solid waste and sewage treatment facilities, emergency services, water and power services, and labor regulations (Island Resource Foundation, 1996). In St. Thomas, a few of the public sector infrastructures are only just being addressed while many are still in need of improvement before they can support private tourism infrastructures adequately. For example, the emergency phone number 9-1-1 does not always connect or connects to the wrong island (personal communication, Mattei, 2013b). Local regulatory agencies like the Health Department, Water and Power Authority (WAPA), and Virgin Islands Department of Public Works, have all been in serious violations of safe operating practices (Environmental Protection Agency, 1998, 2008, 2012). Electrical power service is not only inconsistent, but costs the highest of all U.S. states and territories resulting in many private sector businesses being forced to close and move off of St. Thomas. (Water and Power Authority, 2012).

Finally, labor policies like the Federal minimum wage of \$7.25 is insufficient for living in St. Thomas by \$2.75 for a single person or by over \$15 for a family of three. Employees who are under 20 years of age, work for tips, or are full time high school or college students can legally get paid can legally be paid \$4.25, \$2.13, or \$6.16 per hour respectfully in St. Thomas (Kotval, Kotval-K., Machemer & Mullin, 2012; MinimumWage.org, 2012). This stipulation includes most hotels and tourism based employees. Paying minimum wage or less means that a large number of tourism's employees are completely disenfranchised from the very industry in which they work.

Improving public sector services like those aforementioned would not only encourage more private sector businesses to invest in St. Thomas's tourism industry, but would also enhance the quality of life for local residents. As Dunn and Dunn (2002)

observed, for tourism to be successful and not an exploitative industry, involvement of local residents in tourism must be organized and planned. Such efforts will inevitably improve tourist/local relationships. Updating emergency service protocol, equipment, and staff training is one step to ensuring the safety and well being of everyone on St. Thomas. Improving the quality and effectiveness of regulatory agencies would help ensure long-term safe practices of St. Thomas services. Making electricity more affordable and reliable would help many private sector businesses by reducing their overhead costs; savings that could be converted into increased workers' wages, possibly improving tourist/resident interactions. Lastly, establishing fair labor practices and implementing a minimum wage that is compatible with the cost of living in St. Thomas would significantly help curb the poverty rate and improve the quality of living for over 30 percent of the island's poor population and over 40 percent of the island's children currently living in poverty (Kotval et al., 2012; Bailey & Ricketts, 2003, VINow, 2013).

In sum, public sector improvements in St. Thomas are needed for the economic survival of St. Thomas. The ripple effect of such improvements would not only impact tourism via the private sector, but island residents as well, potentially improving tourist/resident interactions. The questionnaires included in this proposal will assess local resident knowledge of how these infrastructures relate to them and to tourism.

6 METHODOLOGY

The methodology for this research initiative is based on the implementation of two questionnaires listed in Appendices A and B. These survey tools utilize nominal, ordinal, and interval ratio questions. The questionnaires, which will be in both English and Spanish languages, will be disseminated by research assistants to adults of any gender at various locations around the island. A set number of copies of each survey will be printed and offered to both tourists and local residents until all questionnaire forms have been complete. The points of dissemination will be at high traffic areas for tourist and locals alike. The number of completed surveys will provide a rich perspective of both tourists and local residents on tourism and the environment in St. Thomas. Using survey analysis software such as Survey Monkey or SPSS, the results will be coded and analyzed. The primary researcher will then offer a written report of the findings once the analysis is concluded.

The primary limitation of this study is language. Tourists and residents who cannot read English or Spanish will be excluded from this study. Though Spanish and English are the two most prominent languages spoken and read, there are numerous other languages used by residents and tourists who may be very interested in completing the questionnaire in their own language, but who cannot because of a language barrier. Each research assistant will encourage the tourist or resident to answer each question honestly and to the best of the respondent's ability and will not guide or influence participants' responses.

7 CONCLUSION

The implications of this study will be far reaching. Assessing tourist and local residents' level of interest in tourism and environmental awareness will benefit many sectors of not just St. Thomas, but potentially the whole U.S. Virgin Islands territory. As a result of this study, tourism industry investors can specifically allocate resources to address their areas of weakness as well as to bolster their areas of strength. The U.S.V.I. Hotel and Tourism Association, the Virgin Islands Department of Tourism, the St. Thomas/St. John Chambers of Commerce, the Department of Education, the University of the Virgin Islands, and the St. Thomas Taxi Association are just a few organizations that will directly benefit from the implementation of streamlined tourism related initiatives designed from the results of this study. It is this author's belief that if sustainable tourism changes are to take place, the residents of St. Thomas need to support them through actions by establishing accountability measures. Furthermore, this author is confident that this seminal work will establish a foundation for future research on the social, cultural, and economic perspectives of the U.S. Virgin Islands.

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DISCLAIMER AND STATEMENT OF WILLING VOLUNATRY PARTICIPATION

Dear Participant,

As part of this tourism research project, we are asking that you take a few minutes to complete the survey below.

Our research study's objective is to examine the attitudes and opinions of local residents on tourism. The goal of this research is to include local residents' input on sustainable tourism initiatives for St. Thomas, Virgin Islands. To gauge the community's perspectives and input, we want to ask participants to complete the survey herein as honestly and completely as possible. By participating in this exciting groundbreaking research, you are not only assisting our community in assessing an accurate read on public opinions on tourism, but you are also helping to better plan a future for St. Thomas.

Participation in this survey is completely voluntary and anonymous. It may take you up to 30 minutes to complete this survey. You must be 18 years of age or older, must reside in St. Thomas, must understand written English and/or Spanish, and be of sound mind. You may terminate your own participation in this study at any time by discontinuing to fill out the survey. You, as the survey participant, can opt to answer all, some, or none of the survey questions below. You will not gain any direct benefit from participating in this survey, nor will you incur any risks. The information obtained from this survey will be used for informational use only with the goal of assessing local resident perspectives of tourism for the purpose of establishing sustainable tourism initiatives for St. Thomas, Virgin Islands.

Thank you for your participation in this ground-breaking research. We value your time and opinions.

Elizabeth Estes, ABD

Primary Investigator

Appendix A

Resident Survey

SECTION 1: DEMOGRAPHICS

1. What is your home town, state, and/or country?

2. What is your ethnicity? _____

3. What is your gender?

Male _____ Female _____ Other _____

4. What is your age range?

18-24 _____ 25-34 _____ 35-44 _____ 45-54 _____ 55-64 _____ 65 + _____

5. How many years have you lived in St. Thomas?

0-5 _____ 6-10 _____ 11-15 _____ 16-20 _____ 21-25 years _____ 26 + _____

6. What is the highest level of education you have completed?

Some high school _____ High School Graduate _____ Some College/Associates Degree _____
Bachelor's Degree _____ Graduate or professional degree _____

7. What category best describes your household income?

Less than \$20k _____ 21k-50k _____ 51k-70k _____

71k-99k _____ 100k-150k _____ 151k _____

SECTION 2: RESIDENT PERSPECTIVE

8. How do you define a St. Thomian?

A person born in St. Thomas _____

Someone who's parents were born in St. Thomas_____

Anyone who lives in St. Thomas_____

A West Indian living in St. Thomas_____

9. Is a "local" always a St. Thomian?

Yes_____

No_____

10. Is a St. Thomian also a West Indian?

Yes_____

No_____

11. Is a local also a West Indian?

Yes_____

No_____

SECTION 3: INDIVIDUAL INFORMATION

12. From where are your grandparents? _____

13. In what estate do you live? _____

14. Do you work?

Yes ____ No_____

15. What best describes your line of work?

Entertainment/Tourism_____ Education_____ Health Care_____

Construction_____ Government_____ Real Estate_____

16. How do you get to work or around the island?

Personal car____ Safari/Taxi _____ Carpool _____ Walk _____

17. Do you own or rent your place of residency? Rent ____ Own_____

18. How many people live with you?

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0-1____ 2-4____ 5-7____ 8 or more____

19. Does your place of residence have drinkable tap water?

Yes____ No____

20. About how much is your average monthly electricity bill?

Less than \$150____ \$151-\$250____ \$251-\$350____ Over \$351____

SECTION 4: TOURISM PERSPECTIVE

21. How important do you think tourism is to St. Thomas?

Not Important____ Somewhat Important____ Important____ Very Important____

22. How well do you think St. Thomas treats its tourists?

Very well____ Adequately____ Not well____

23. How do you feel about the number of tourists who visit St. Thomas each year?

Not enough tourists visit____ Just enough tourists visit____ Too many tourists visit____

24. What do you think is the primary reason tourists come to St. Thomas?

Duty free shopping____ Cultural experience____ Beaches____ U.S. territory____ Other____

25. What percentage of tourists do you think return to St. Thomas within 5 years?

0-20%____ 21-40%____ 41-60% 61-70% 71+ %____

SECTION 5: ENVIRONMENT

26. Rank in order of importance the following list as they relate to you personally with "1" meaning the most important and "10" meaning the least important:

____ Cost of living (price of housing, utilities, food, gasoline, etc.)

____ Crime

- ___ Food security (a reliable supply of food)
- ___ Health of the environment
- ___ Homeland security (protection against the threat of terrorism)
- ___ Overdevelopment
- ___ Emigration (residents leaving St. Thomas to live somewhere else)
- ___ Education
- ___ Tourism
- ___ Energy matters (reduction of green house gases, development of alternative energy options)
- ___ Other (please specify) _____

27. Again, rank in order of importance the following list as they relate to you personally with "1" meaning the most important and "10" meaning the least important:

- ___ Air quality
- ___ Availability of safe drinking water
- ___ Cleanliness of beaches
- ___ Climate change
- ___ Coastal water quality
- ___ Habitat protection
- ___ Invasive species
- ___ Preservation of coral reefs and fisheries
- ___ Preservation of land-based and marine plants and animals
- ___ Other (please specify) _____

28. From what energy source do you think St. Thomas generates most of its electricity?

Oil ___ Coal ___ Natural Gas ___ Solar ___ Wind ___

29. Which of the following have you disposed of in the garbage or a dumpster?

Plastic water bottles _____ Batteries _____ Florescent light bulbs _____ Motor oil _____

Electronics (T.V., Computer, VCR/DVD) _____

Household appliances (Refrigerator, Washer, Stove) _____ None of the Above _____

30. Where do you think live-aboard boats deposit their raw sewage?

Ocean _____ Holding Facility _____ Public Water Treatment Plant _____

SECTION 6: TOURISM INFRASTRUCTURES

31. Do you think emergency services like fire, police, and ambulances work effectively and efficiently?
Yes_____ No_____ Not sure_____
32. Do you have confidence that agencies like Environmental Protection Agency and Water and Power Authority adequately monitor the safety and security of operating procedures for businesses and private residences alike?
Yes_____ No_____ Not sure_____
33. Do you think the Federal minimum wage of \$7.25 is adequate, too low, or too high for St. Thomas?
Adequate_____ Too Low_____ Too High_____
34. Do you think hiring practices in St. Thomas are gender biased?
Yes_____ No_____ Not sure_____
35. Is there anything else you would like to add for this survey?_____

DISCLAIMER AND STATEMENT OF WILLING VOLUNATRY PARTICIPATION

Dear Participant,

As part of this tourism research project, we are asking that you take a few minutes to complete the survey below.

Our research study's objective is to examine the attitudes and opinions of tourists on St. Thomas tourism. The goal of this research is to include St. Thomas tourists' input on sustainable tourism initiatives for St. Thomas, Virgin Islands. To gauge our guests' perspectives and input, we want to ask participants to complete the survey herein as honestly and completely as possible. By participating in this exciting groundbreaking research, you are not only assisting our community in assessing an accurate read on tourists' opinions on tourism, but you are also helping to better plan a future for St. Thomas.

Participation in this survey is completely voluntary and anonymous. It may take you up to 30 minutes to complete this survey. You must be 18 years of age or older, must be a

visiting guest of St. Thomas, must understand written English and/or Spanish, and be of sound mind. You may terminate your own participation in this study at any time by discontinuing to fill out the survey. You, as the survey participant, can opt to answer all, some, or none of the survey questions below. You will not gain any direct benefit from participating in this survey, nor will you incur any risks. The information obtained from this survey will be used for informational use only with the goal of assessing tourists' perspectives of tourism for the purpose of establishing sustainable tourism initiatives for St. Thomas, Virgin Islands.

Thank you for your participation in this ground-breaking research. We value your time and opinions.

Elizabeth Estes, ABD

Primary Investigator

Appendix B

Tourist Survey

SECTION 1: DEMOGRAPHICS

1. What is your home town, state, and/or country?

2. What is your gender?

M____ F____ Other____

3. What is your ethnicity? _____

4. What is your age range?

18-24____ 25-34____ 35-44____ 45-54____ 55-64____ 65 +

5. What is the highest level of education you have completed?

Some high school____ High School Graduate____ Some College/Associates Degree____
Bachelor's Degree____ Graduate or professional degree____

6. What category best describes your household income?

Less than \$20k____ \$21k-50k____ \$51k-70k____ \$71k-99k____
\$100k-150k____ \$151k and over____

SECTION 2: TOURIST INFORMATION

7. How long was your visit on St. Thomas?

1-3 days____ 4-6 days____ 7-10 days____ 11+ days____

8. What were two of your other destination options you considered besides St. Thomas?

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1)_____ 2)_____ Did not consider another option_____

9. Where did you stay?

Hotel/Resort_____ Boat/Ship_____ Guest House_____ Private Residence_____

10. How did you travel around the island?

Rental car_____ Taxi_____ Friend_____ Didn't travel_____

11. How many times did you dine at a restaurant off property from where you were staying?

1-3_____ 4-6_____ 7-9_____ More_____ None_____

SECTION 3. TOURISM PERSPECTIVE

12. Did your vacation meet your expectations?

Yes_____ No_____

13. What was your impression of St. Thomas?

Better than expected_____ As expected_____ Less than expected_____ No expectation_____

14. Were the prices as you expected?

Higher_____ Just right_____ Lower_____

15. Did you visit any other islands while in St. Thomas?

Yes_____ No_____

16. What did you think of the customer service?

Very friendly_____ Friendly_____ Neutral_____ Not friendly_____ Rude_____

17. How important do you think tourism is to St. Thomas?

Very Important_____ Somewhat Important_____ Important_____ Neutral_____

17. Was this your first time to St. Thomas, USVI?

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Yes _____

No _____

18. Would you recommend St. Thomas as a vacation destination to others?

Yes _____

Probably _____

Not Sure _____

Not likely _____

Definitely Not _____

19. Would you come again to vacation in St. Thomas?

Yes _____

Probably _____

Not Sure _____

Not likely _____

Definitely Not _____

SECTION 4: ENVIRONMENT

20. What did you think of the cleanliness of the island?

Very clean _____

Somewhat clean _____

Not very clean _____

21. What was your impression of environmental conservation in St. Thomas?

Better than expected _____

As expected _____

Less than expected _____

No expectation _____

22. Were you aware that St. Thomas has no natural water source?

Yes _____

No _____

23. How do you think St. Thomas generates its power?

Coal _____ Oil _____

Gas _____

Solar _____

Wind _____

24. How much of St. Thomas's power do you think comes from renewable resources (wind, solar, biofuel)?

1-5% _____

10-30% _____

Over 50% _____

25. What do you think of renewable energy (wind, solar, biofuel)?

Positive _____

Neutral _____

Negative _____

SECTION 5: TOURISM INFRASTRUCTURES

26. What is the average cost of your monthly electric bill at home?

Less than \$50 _____ \$51-\$150 _____ \$151-\$250 _____ \$251-\$350 _____ Over \$351 _____

I don't receive a bill _____

27. Did you find the roadways and walkways easy to navigate?

Yes _____ Somewhat _____ No _____ Not Applicable _____

28. Did you know St. Thomas residents pay the most for electricity out of all U.S. states and territories at 51 cents a kilowatt?

Yes _____ No _____

29. During your stay in St. Thomas, did you feel safe and secure, trusting in the local police/emergency response teams should you have needed to rely on their services?

Yes _____ Somewhat _____ No _____ Not sure _____

30. Do you think the Federal minimum wage of \$7.25 is appropriate for St. Thomas?

Adequate _____ Too Low _____ Too High _____

31. How would you rate your departure experience at the airport or dock?

Excellent _____ Good _____ Fair _____ Poor _____

32. Is there anything else you would like to add? _____

THE EFFECT OF VIRTUAL COMMUNITIES AND SOCIAL NETWORK SITES ON TOURISM DESTINATION CHOICE

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ABSTRACT

Competition and globalization are factors that challenge tourism enterprises and destinations to develop and introduce new products, services and concepts at an increased speed. At the same time, Internet has an enormous diffusion and radically changed most of our economic and social life and impacted the way we communicate, work and conduct business. The emergence of Web 2.0 or Travel 2.0 brings together the concept of social networking/virtual communities and applies it to the tourism industry. The importance of Travel 2.0 features and tools, and specifically of social media environments, is growing fast and many tourism businesses are changing their approach to the manners of presenting themselves online (Au, 2010; Jones & Yu, 2010; Schegg et al., 2008). However, tourism operators have not yet fully understood the new technological world by

and still many concerns, such as credibility of the information online, possibility to forge for particular interests by unscrupulous competitors, privacy, overload of useless information, in addition to the usual (in the technology arena) lack of resources or skill shortage are the most reported issues are brought forward.

This study analyzes factors that influence tourists' involvement in virtual communities and asserts that virtual communities and social network sites (SNSs) support tourism organizations to develop and improve their marketing functions, as they can understand better their customers' satisfaction and behavior, to reach worldwide customers in a cost effective way, to engage in a direct dialogue with the customers and undertake corrective actions to improve their offering, and ultimately influence tourists' destination choice.

Key words: Web 2.0, virtual communities, tourism marketing, social network sites

1 INTRODUCTION

The tourism industry can be seen as one of the first business sectors where business functions are almost exclusively using information and communications technologies (ICTs) (Garzotto et al., 2004). The benefits from ICTs, particularly the Internet, for tourism are substantial, since they enable knowledge about the consumer or tourist to be gathered, as well as vice versa. In the modern economy, knowledge is commonly recognized as the most important factor in increasing the competition among firms and regions. If one considers knowledge as the organization of information designed to provide an answer to a question or solve a certain problem, information can be seen as the fuel of knowledge which produces innovation. Innovation is a continuous learning process because the strategic value of information, changes in time; therefore a regular knowledge update is important. It is also a highly coordinated process, because it demands the interaction of several actors, the selective acquisition of information, and the creation of networks in an attempt to produce value through the use and exchange of information throughout several activities inherent to the innovation process (Santinha and Castro, 2010).

ICTs also help tourists to overcome risks regarding tourism destination choice, such as (Jacobsen et al, 2012:40): monetary risks (eg. feeling of wasting money); functional risks (eg.the standards of the place did not meet tourists' requirements); physical risks (eg. avoiding get injured or ill); social risks (eg. visiting a fashionable place and getting a high status); psychological risks (eg. not damaging the self-esteem, by feeling guilty that there was not enough time spent looking for more information about the place).

Recently, new applications that facilitate interactive information sharing, collaboration and formation of virtual communities, known as Web 2.0., is a natural development of the original Berners-Lee's idea of "a collaborative medium, a place where we all meet and read and write" (Richardson, 2006: 1). With the introduction and the diffusion of the interactive Web 2.0 features and applications, tourists everywhere see the potential for new technologies to improve their ability to make travel plans (Sheldon, 1998; Smith & Jenner, 1998) and Web marketing is gradually becoming mainstream (Buhalis, 2003; Fesenmaier, Gretzel, Hwang, & Wang, 2003). Perhaps marketing and distribution are the most affected business functions from the technological revolution (O'Connor, 2008). New online technologies within the tourism industry have significantly impacted on communications, transactions and relationships between the various industry operators and with the customer, as well as between regulators and operators (Galloway, Mochrie and Deakins, 2004; Sharma, Carson and De Lacy, 2000; Sheldon, 1998; Werthner and Klein, 1999a). This happens in particular with Social Networks (SNs) which seem to have rapidly attracted a considerable attention by Internet users of all ages and are discussed below.

2. VIRTUAL COMMUNITIES AND SOCIAL NETWORK SITES IN WEB 2.0 ERA.

The emergence of Web 2.0 or Travel 2.0 brings together the concept of social networking/virtual communities and applies it to the tourism industry. The most cited definition of a virtual community was firstly given by Rheingold (1993, p. 58) as "a virtual community is a group of people who may or may not meet one another face-to-face, and who exchange words and ideas through the mediation of computer bulletin boards and networks".

In the Web 2.0 era, the boundaries between information producers and users is blurred, and the usual concepts of authority and control are radically changed. Among the other consequences, marketing approaches aiming at improving online reputation are being greatly affected. Brand awareness, one of the objectives of classical marketing practices transforms into brand engagement, purpose of Marketing 2.0., which passes through experience and is created by the perceptions, attitudes, and behaviors of those with whom the different companies and organizations are communicating (Weinberger, 2007). As stated ten years ago by the Cluetrain Manifesto (Locke et al., 2000: xxiii): "people in networked markets have figured out that they get far better information and support from one another than from vendors." Thus, virtual communities are gradually becoming incredibly influential in tourism as consumers increasingly trust better their peers, rather than marketing messages. Virtual communities influence all three phases which were identified as being influential in travel experience formation process (Milano, 2010):

- pre-experience, built on other people's travel stories, before travelling;
- experience during travel or stay, today increasingly shared real-time through mobile applications;

- post-experience, which disseminates comments, evaluations, emotions.

Virtual communities vary in the scope of their content from fairly simple lists of resources to complex cyber environments offering net-citizens information and the opportunity to socialize with likeminded individuals. Some of these have arisen spontaneously, while others have been sponsored or managed by companies (Flavian and Guinaliu, 2005). Free Software (FS) communities are virtual communities that help companies to have better relations between them and their consumers and vice versa. Members of FS communities are linked by common admiration to the same product or brand etc. being a part of such communities is important for participants because they can be active in discussions, forums, they can recommend and help in picking one of products of their favorite brands or products. For them existence of this community is like a real one and can influence their behavior. Secondly, the virtual community can help to know better the needs or desires of you or a group of people (Casaóla et al, 2010:364). Examples would be communities based on shared interests (such as wine-enthusiasts' Virtual Vineyards), or communities held together by product or brand loyalties (e.g., Apple.com/usergroups). In any case, these virtual environments represent fertile territory for the dissemination of eWOM and the creation of "buzz". If a virtual community wants to be successful, its members have to show strong involvement. They should also know how to promote a community to non-members. According to literature review, the most important interactions in a virtual community are:

- Identification. This concept is divided in affective and cognitive component: the cognitive one is said to be a result of perception of similarities with other members and dissimilarities with people who are not in a group; the affective component is believed to be this type of identification experienced when a person is emotionally involved with a group (Casaóla et al, 2010:358-359). Identification with a group impacts consumer motivation to communicate and interact with the rest of a group members. It leads to further participation in a group and recommending community. *'Broadly speaking, if the consumer is identified with a group, participation in joint activities in the collective will be viewed as congruent to personal values, so that s/he will be motivated to participate actively in the community and help other members* (Casaóla et al, 2010:361). Online social networks can guarantee a social support. You can always ask for an information, advice, meeting. As the membership grows, you have more alternatives or possibilities to get such help. These all can attract you in a way that you will feel more identified with a group. But on the other hand, the network size can destroy net quality, which can be something opposite to increase identification with the SNS (Chiu et al, 2013:4-5).
- Satisfaction. We may define satisfaction *'as an affective condition that results from a global evaluation of all the aspects that make up the relationship'*. We can say that if a product is better than a customer assumed, he or she is satisfied. If it is not, the customer is dissatisfied (Casaóla et al, 2010:359). If our requirements will be met, we would like to participate longer in virtual community because we feel good. If the basic needs

(satisfaction) will not be ensured, long term presence in the virtual community is not possible. But if we are satisfied from our previous interactions and in the community it can *'[...]help to develop profitable behaviors such as positive word-of-mouth (Casaóla et al, 2010:360)'*. Then it is possible that a consumer is able to promote and recommend the virtual community to non-members. There are also some complementarities so that you can feel more satisfied. That means for example additional applications, services etc. It is especially important, as while using complementarities, we can feel whether achieved our goal or not. According to the article *'[...] when an individual achieves the goal of having fun and relaxing by playing an online game, a complementary application in SNS, he/she will experience a pleasurable emotional state of satisfaction with the SNS (Chiu et al, 2013:6)'*. We can note that having additional, complementary functions or services will increase user's satisfaction of SNS.

- Continuanace Participation. It is very crucial as on it mainly depends the future and success of the community. When we participate in the 'life' of the virtual community we can guarantee its endurance and help achieve groups' goals (Casaóla et al, 2010:359). Vogt and Fesenmaier (1998) stated that participation and attitude are the primary dimensions of consumer behaviour in the virtual communities.
- Community Promotion. When a consumer wants a product, brand or just virtual community to be known or recommended to non-members, he or she uses promotion. Community Promotion is also very important in a 'life' of FS community. It makes it more attractive to the potential future members by for example *'[...] talking about the benefits of being a part of the community, inviting non-members to join the virtual community or emphasizing the positive aspects of the community when somebody criticized it (Casaóla et al, 2010:360)'*.
- Loyalty. Loyalty is the crucial factor in the success of virtual community (Casaóla et al, 2010:360). The longer tourists are in a virtual group, the more loyal and engaged to this organization they become, because they feel that *'[...] the quantity of value received from participating in the community is greater than the value of non-participating (Casaóla et al, 361)'*. They want to be in a group as long as it is possible so you also do everything to make it 'live'. It is obvious that they try to recommend and promote your organization to non-members. We can say that the more participation to the group you feel, the more promotions and recommendations you want to do. If we are active in a group, we try to be good participants, and this leads to our greater loyalty to a virtual group. We feel more emotionally tied and identified to a group (Casaóla et al, 2010:361).

Since many travelers like to share their travel experiences and recommendations with others, VTCs have become one of their favourite areas to post their travel diary. Additionally, online travelers are enthusiastic to meet other travelers who have similar attitudes, interests, and way of life (Wang, Yu, & Fesenmaier, 2002). Contents generated by users (UGCs) have an acknowledged importance in all fields, and in tourism in

particular (Akehurst, 2009). Their positive effects have recognized repercussions on quantifiable phenomena such as e-commerce, but also on intangible matters such as those related to the image or the informational side of specific products or services (termed sometimes info-commerce). The continuing growth of UGCs' influence, due to their wideness and deepness, makes them perceived as even more reliable than official sources for a tourist. According to PhoCusWright (2009) nine out of ten cybertravelers read (and trust) online reviews on tourism products and services (hotels, restaurants and destinations). A Virtual Travel Community (VTC) makes it easier for people to obtain information, maintain connections, develop relationships, and eventually make travel-related decisions.

The impact of modern ICTs and Web 2.0 poses a big challenge to any business or organisation (private or public) working in today's tourism arena. These changes and developments in the travel market, force all tourism players to rethink their business models and to take drastic actions in re-developing their value chains. Tourism organizations aim to disintermediate all intermediaries that add cost to their production and distribution. For example, tour operators aim to sell their packages direct, bypassing travel agencies. They also disbundle their packages and sell individual components. On the other hand, travel agencies dynamically package tour products and support the development of customized packages, disintermediating tour operators. The web therefore introduced utter transparency in the marketplace

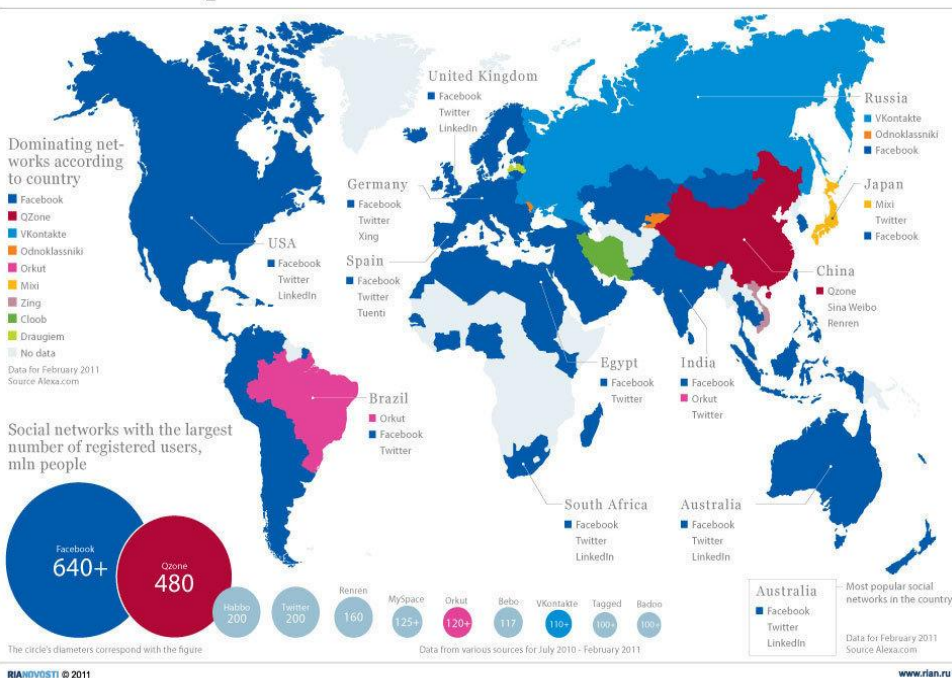
VTCs have a large potential impact on the tourism industry, and by analysing VTCs' content, travel organizations can understand their customers' satisfactions and behaviour, and undertake corrective actions to improve their offering. They can also increase brand awareness and strengthen brand association through the assistance of VTCs. The tourist (traveler, visitor etc.) makes extensive use of these technologies and shows to appreciate quite much the possibilities offered by the Internet today. The adoption issues commonly referred to social media application, include aspects such as a certain level of suspicion, distrust and reluctance to share information, comments or suggestions with others. This amazing new phenomenon of SN can be interpreted as starting a new trend, especially in some countries, where generic SNs (Facebook first and Twitter), which are being progressively more used in travel and tourism, as it can be seen from fig.1(Cosenza, 2010).

Apart from a few areas (part of Latin America, Russia, China and some others), Facebook shows to be the most widespread SN. Facebook has become in few years by way the largest (in number of users) and the most widespread (in geographical terms) online social network in the World (Fig. 1 after Cosenza, 2010). Facebook is very popular and without any doubts it influences our lives. Some people say that they feel happier when they update their status, they explain that it helps them to keep in touch with people when they

are not around. Facebook is one of the SNSs that uses many complementarities. It tempts with many games, photos sharing, applications. However, research conducted in Germany showed, that the more time you spend on Facebook, the poorer your life seems to be for you (Elmore, 2013). Web 2.0 or Travel 2.0 providers such as Tripadvisor.com, IGOUGO.com and Wayn.com also enable consumers to interact and to offer peer to peer advice.

Fig. 1. The World Map of SNS (Cosenza, 2010).

The world map of social networks



TripAdvisor (www.tripadvisor.com) for example, is amongst the most successful social networking/virtual community in tourism that facilitates the reviewing of all hotels around the world and brings together individuals in discussion forums. The system provides users with independent travel reviews and comments written from TripAdvisor members and expert advisors and provides a powerful platform for interaction between peer, as user satisfaction is a major factor for evaluating a travel organisation.

Nevertheless, better understanding VTC users' behaviour and motivation can assist tourism practitioners and policy makers to establish, operate, and maintain VTCs in a more

efficient way. This, in turn, facilitates consumer centric marketing or relationship marketing. VTCs, however, may be at risk of losing members if their members are not satisfied with the content, design, security policies, and repercussions for non-compliance with community rules. Credibility of the information online, possibility to forge for particular interests by unscrupulous competitors, privacy, overload of useless information, in addition to the usual (in the technology arena) lack of resources or skill shortage are the most reported issues concerning SN application.

3. CONCLUSIONS

This paper argues that the Internet forces tourism organizations around the world to change their strategies dramatically (Buhalis & Zoge, 2007). Constant innovations of both product and process supported by proactive and reactive strategies are some of the few sources of competitive advantage in the Internet era (Buhalis, 2003). VTCs have a large potential impact on the tourism industry, and by analysing VTCs' content, travel organizations can understand their customers' satisfactions and behavior, and undertake corrective actions to improve their offering. They can also increase brand awareness and strengthen brand association through the assistance of VTCs. The effects of these tools on the image and the popularity of destinations or other tourism operators, mainly in the hospitality sector, in which the direct contact, real or virtual, with the customer and their crucial role for the good health of the companies are tremendous (Burgess et al., 2009; Inversini et al., 2009; Matloka & Buhalis, 2010; Sigala, 2010).

Identification of tourism destinations competing for the same market can be assisted by a Group Decision Support System (GDSS). In this way, decision-makers can include their subjective and objective views for analysis like the traditional forms of competitive analysis. Similarly, there was a shift in the bargaining power of suppliers, as the Internet provided alternative procurement opportunities. The bargaining power of suppliers was also enhanced by allowing direct contact with consumers and decreasing distribution costs while creating the opportunity for partnerships with countless affiliates and other distributors. Consequently, tourism enterprises for the first time ever did not have to rely exclusively on powerful intermediaries, such as Tour Operators or Global Distribution Systems.

Tourism marketers can no longer ignore the role of social media in distributing travel-related information without risking to become irrelevant (Xiang and Gretzel, 2010: 186). The virtual communities phenomenon has become a social convergence trend, where specialized travel websites increase their sociality by adopting applications which enable real-time sharing of contents among the visitors, while giants such as Facebook try to occupy vertical markets through dedicated services or acquisitions of specialized companies as the social DEtravel recommendation site Nextstop (see:

<http://www.insidefacebook.com/2010/07/08/facebook-acquires-social-travel-startup-nextstop/>).

However, tourism operators have not yet fully understood the new technological world by and still many concerns are brought forward. These positions however, create a tension between demand (tourists, travellers, visitors) and supply (tourism businesses and organizations). As well reported by Xiang and Gretzel (2010: 186): “social media Websites are “ubiquitous” in online travel information search in that they occur everywhere [...] no matter what search keywords a traveler uses. Certain social media Websites [...], which can be considered more comprehensive and travel-specific sites, are becoming increasingly popular and are likely to evolve into primary online travel information sources. [...].

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UNDERSTANDING THE IMPACTS OF CRUISE TOURISM AND THEIR REMEDIATION COSTS FOR SMALL ISLAND COMMUNITIES IN THE AEGEAN

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ABSTRACT

The cruise industry continues to enjoy strong growth, and represents a significant portion of the tourism industry as a whole. Nevertheless, amid considerable success, questions remain as to the environmental impact it can have on delicate natural systems, and the disruptions caused within small host communities. There is a need to understand the full costs of cruise tourism; to put a value on the things that are disrupted or damaged when visitors arrive in large numbers, and to ensure that adequate funds are recovered by the communities themselves – and used for remediation.

Seeking to arrive at sustainability through a 'Triple Bottom Line' approach, the aim of this research was to investigate the environmental and social impacts upon a Greek island destination, and to compare these with the economic benefits resulting from cruise tourism. Empirical research was conducted in early 2013 in the small island community of Chios. The research involved in-depth interviews with stakeholders such as residents and local business owners. The broad, open-ended format of the questioning encouraged

interviewees to share their opinions and experiences, identifying a wide range of ways in which cruise tourism had affected the social and natural environment of the destination, and posing questions for the future development of cruise tourism on the island.

Key Words: Sustainable cruise tourism, socio-economic factors, carrying capacity, Mediterranean region

INTRODUCTION

Tourism remains one of the most important industries for Greece and her islands [Tselentis et al, 2012]; the World Travel and Tourism Council reported that tourism in Greece contributed €12bn, or 6.5% of total GDP for the nation [WTTC, 2013]. Furthermore, tourism directly supports 330,500 jobs, representing 8.8% of total employment. With an anticipated 5 million cruise tourists visiting Greece this year [Politis, 2013], significant numbers of day visitors arriving via cruise ships have the potential to contribute substantially to local economies [ECC, 2013]. Quantifying the economic contribution of cruise tourism remains problematic, however, since it comprises business transacted with locally-owned leisure facilities, restaurants, retail shops, visitor attractions and the like, plus charges levied by port authorities (handling charges and taxes), and charges imposed by cruise operators that cruise tourists pay to partake in port excursions. These last are usually paid in advance of the visit, and typically include transport, entry to attractions, and refreshments. Such payments will eventually trickle through as a reduced sum for local businesses, for services rendered, but what can be construed as a high price to the cruise tourist will in fact be greatly reduced when it reaches the host economy.

For Chios, tourism in general is an important contributor to the local economy, and cruise tourism is surprisingly significant, with day visitor numbers approaching those for leisure tourists arriving by air. Ashcroft and Associates [2011] describe Chios as having an increasing appeal, particularly for cruise tourists. Chios can be considered atypical, when compared to other Greek Island destinations such as Corfu, Rhodes, Kos, Crete or Santorini; it is at an early stage of tourism and especially cruise tourism development, and decisions must be made as to the extent to which the host community will seek to develop the industry. Critical in such decisions is an understanding of the level of benefit to the island's economy, and the impacts in terms of sustainability.

RESEARCH METHODOLOGY

A useful starting point when considering issues of sustainability is Elkington's [1994] vision of Triple Bottom Line (TBL) accounting, often summarised as "people, planet and profit". Here, an activity is only said to be sustainable (which is to say, viable in the long term) if it is socially just, environmentally benign and commercially sound. This definition has been widely adopted, and the Venn diagram that shows sustainability existing only at the confluence of all three issues is well known – but on its own it does not provide a means for practitioners to pursue sustainability. According to MacGillivray [2004] for sustainability to occur "economic, environmental and social balance sheets must all be in the black", yet the toolsets to measure environmental and social harm lag far behind the level of accuracy and wide understanding found in the assessment of economic performance.

Mitchell et al [2007] found that TBL reporting promoted sustainability thinking within organisations, but trade-offs between the different TBL dimensions remained difficult. (In a sustainable tourism context, for example, this might mean choosing between job creation and natural habitat destruction, when considering the construction of facilities.) Adams [2006] states that trade-offs between TBL elements are a flawed concept because governments and businesses will always tend to prioritise the economic. It can be argued that it is human nature for a system to tend toward further environmental or cultural degradation over time – at the risk of "killing the goose that lays the golden eggs." Middleton and Hawkins [2012] concur, warning that tourists can destroy the natural environment that attracted them to the destination in the first instance, if their tourism activities are not managed sustainably.

In this study, trade-offs have not been attempted; final decisions rest with the host community, after all. Instead, each component of the system has been examined to identify the scale, value and growth potential of the industry (profit), the environmental strain it imposes upon an island community (planet) and the social impacts upon the hosts (people).

Graci and Dodds [2010] acknowledge that it is important to establish just who the principal stakeholders are in the area of sustainable tourism, and more importantly for this study, in relation to island destinations. In this context we use Freeman's [1984] definition of a stakeholder, as a person or group who may hold an interest in the ability of an organisation to exercise actions involving the destination and possibly influence change. Several authors argue that qualitative research in tourism is an evolutionary practice and well recommended [Veal, 2011; Phillimore and Goodson, 2004]. When taking this approach Veal argues that it is possible to obtain a more comprehensive account of the situation in tourism related scenarios, involving individual feelings and thoughts, as opposed to the limited amount of information obtained from a larger study that quantitative research can reveal. Veal also argues that individuals absorbed in tourism experience situations are best positioned to interpret their account of the situation in a qualitative type of information

gathering. In view of such recommendations, qualitative research was carried out among local businesses. Graci and Dodds recognise local businesses as being the 'grass roots' of the tourism industry, especially in an island destination [2010] since local businesses, as stakeholders, work to ensure that a high proportion of the income generated from tourism reaches the local economy, and that it is distributed across the island community.

Empirical research was carried out through in-depth personal interviews with a variety of local business owners, citizens and officials, in a non-directive manner. An interview guide was formulated, featuring semi-structured, broad, open-ended questions aimed at obtaining comments illustrating the experiences and opinions of the interviewees. In total, eighteen interviews were conducted, obtaining contributions from local residents, café and shop workers, taxi drivers, law enforcement and local officials.

The stakeholder interviews allowed the researchers to catalogue the concerns of the interviewees, in terms of the ways that cruise tourism affects the business, social and natural environment of an Aegean island community. These distinct issues are discussed in Sections 3, 4 and 5, respectively.

ASSESSING THE SOCIAL IMPACTS OF CRUISE TOURISM

The social aspects of sustainability vary from one business proposition to another, but might include issues such as health and safety, consumer rights, participation in local democracy, fair dealing with consumers and suppliers, equal opportunities, infrastructure and access to services, culture and heritage; a list of potential impacts that remain difficult to measure or assign a value to.

The interviewees reported a number of social issues. By far most commonly identified, from 16 of the 18 interviewees, was that cruise tourism is affecting the opening hours of businesses in the port area. This represents a recent change; before the economic crisis tourists were left with little to do when shops closed mid-afternoon, but now their business is considered more valuable. The extended opening hours are something of a grey area, legally, but closure is not enforced. Taxi drivers were also reported to be working a lot on days when there was a cruise ship in port, and some interviewees reported that road traffic congestion was an issue on those days.

Interestingly, all interviewees rejected the idea that cruise visitors have a negative affect upon their everyday life; in fact residents rarely interacted with cruise tourists, who tended to take coach tours around the island. An emerging cultural influence on Chios comes from the growing number of Turkish visitors who also arrive by sea, as day visitors or on a two-day cruise from Izmir. Interviewees generally failed to distinguish between Turkish day visitors and more conventional cruise tourists. The emergence of this market segment has

led to new signage appearing on the streets and within shops, where staff have started learning Turkish, and organising related cultural events.

Overall, respondents had relatively little to say that showed cruise tourism in a negative light. Local businesses appreciate the extra revenue, and reported that they cope with the influx of tourists by arranging to have extra staff on duty on 'cruise days'. It was also reported that the short period for which cruise day visitors stay meant that bars and cafés could still serve residents as usual.

ASSESSING ENVIRONMENTAL IMPACTS FROM CRUISE TOURISM

When questioned about environmental impacts, the great majority of interviewees saw no environmental problems at all. Just two reported that cruise ships "pollute the sea" and none mentioned problems of air quality, or climate change. It may be significant that the region is often subject to strong winds, and thus any smoke that the engines of a ship generate will rapidly be dispersed. In any event, 'green' issues seem not to be considered, beyond the two respondents who took exception to the discharging of waste that they assumed to take place. The relevant marine environmental convention, MARPOL, specifies conditions under which the discharge of food wastes, certain cleaning agents, sewage and grey water are permissible [IMO, 2013] – although one respondent's statement that "they empty their tanks just outside our port" is unlikely to describe the discharging of sewage, as a minimum distance of 4.8km from shore is specified for such material.

Metrics for the Environmental Impact of Cruise Holidays

To some extent, environmental impact can be quantified, although this remains highly complex. A common option is to consider the 'carbon footprint', based upon the emissions of greenhouse gases that are associated with the provision of a good or service, and the corresponding risk of climate change. Ward [2010] suggests a figure of 960kg CO₂ per passenger, for a one-week cruise (not including travel to and from the ship). For comparison, annual CO₂ emissions for a person living in Greece are around 8,400kg [World Bank, 2013].

The cruise vessels that call at Chios appear to produce substantially higher CO₂ emissions per passenger. *Le Levant*, a cruise ship that regularly visited Chios in 2011, is reported to consume 14 tonnes of heavy fuel oil (HFO) per day [ship-technology.com, 2012]; using the standard conversion factors published by DEFRA [2012] this quantity of HFO equates to 53,717kg of CO₂ and equivalent greenhouse gases emitted, or 597kg per passenger, per day – and more if full occupancy is not achieved. *Le Levant* carries just 90 passengers in

luxury and at speed; calculations based upon a typical large cruise ship – of the kind not currently seen at Chios – broadly confirms the Ward [2010] figure for CO₂ per passenger, although it should be noted that these basic calculations are for energy use only and do not include food, services, excursions, and the like.

Sustainability calculations based purely upon climate change potential are limited in that they do not address other environmental issues such as toxicity, habitat destruction or the consumption of scarce material resources – nor the other component parts of the TBL, such as social issues. Another key problem when calculating the environmental harm of tourism is that measurements tend to be attributed to the country where emissions occur, rather than being associated with the nationality of the citizens who visit [Kitzes et al, 2007]. This does not affect calculations of environmental degradation at the global level, but can serve to conceal the source of climate change. An additional source of complexity is that some environmental problems are global in nature, such as CO₂ emissions, while others are more local, e.g. affecting water or air quality.

Addressing one example of the latter, EU Legislation (Directive 2005/33/EC) imposed a limit of 1.5% sulphur in HFO used by passenger ships serving the EU with effect from 2010, and further limiting the sulphur content of fuel used when berthed to 0.1%. Sulphur occurs naturally in crude oil, and can be present in HFO at up to 4.5% by weight, but the sulphur dioxide (SO₂) resulting from combustion is known to cause many health problems, plus acid rain. Further sulphur reductions are planned for 2015 and 2020, compelling ship operators to use more expensive, low-sulphur fuels.

Despite the lack of concern about gaseous emissions from those interviewed, the potential for environmental harm is huge, as the data on shipping in Greek waters in Tzannatos [2010] show. Passenger ferries and cruise ships are considered together because the vessels tend to be similar in terms of their performance; taken together they accounted for 18% of ship movements in Greek waters, and 390,633 tonnes of HFO consumed in 2008. Even with low sulphur fuels substantially reducing the local air quality problems, the global issue of climate change remains: based on the DEFRA [2012] conversion factors this fuel usage implies the emission of greenhouse gases equivalent to 1.47 megatonnes of CO₂ – and there are other emissions of concern as well. Vogtländer et al [2002] identified seven different classes of emission (acidification, eutrophication, heavy metals, carcinogens, summer smog, winter smog and climate change), and proposed a common denominator in the form of “prevention costs at the norm”. It may be that an adapted form of this mechanism could be used to assign a cost to the various forms of damage that occur as a result of cruise ship operations, perhaps with the ultimate aim of levying taxes and using money obtained for remediation or offsetting – but we have yet to consider the environmental harm that occurs when passengers come ashore, causing soil erosion in sensitive sites that endure high footfall, or engaging in hazardous or resource-intensive activities during excursions. Fortunately, the low numbers of cruise passengers seen on

Chios at present are unlikely to be doing damage that cannot be repaired by natural processes.

Emerging Improvements to Cruise Ship Environmental Performance

On the technical side, some efforts have been made to improve the 'green' performance of cruise ships: some cosmetic, and some more practical. Fitting low energy lighting and heat-reflecting glass help to reduce the fuel consumed for on-board electricity generation, while "cold ironing" (using a shore-based electricity supply while docked) can further reduce emissions. Tzannatos [2010] and Kalli et al [2009] also reported favourably on the use of a seawater-based scrubber to reduce SO₂ emissions, it being permitted to continue to use fuels with higher sulphur content with this technology in place to treat emissions.

Less conventional attempts to make cruise holidays more 'green' have included the addition of solar panels, sails, and even the introduction of biodegradable golf balls, made from surplus lobster shells [Daley, 2011]; MARPOL [IMO, 2013] classifies conventional golf balls as waste plastic, and prohibits their 'discharge'. Lobster shell golf balls provide an example of how a leisure activity can once again become sustainable, through re-engineering, but there is a danger that the small changes make good press, while failing to address the real problems.

ASSESSING THE BUSINESS IMPACTS OF CRUISE TOURISM

The responses from interviewees regarding the business impacts of cruise tourism on Chios were overwhelmingly positive. Stakeholders were pleased at the additional business generated by cruise ships, although one negative comment concerned a cruise ship that arrived complete with bicycles, allowing the visitors to tour the island without having completed a business transaction with local companies. As cruise ships become increasingly sophisticated, this kind of competition with local leisure amenity providers may become a significant problem.

The business issue that was most commonly discussed concerned the inadequacy of the present-day port. When a cruise ship is berthed within the port, it can prevent access for other vessels, and the larger cruise ships cannot gain access to the port at all, but must transfer passengers to and from shore by tender. The strong winds in the region can make this activity difficult or impossible on some days. As a result, there is considerable interest in the development of a more suitable port, most likely at Mesta on the west of the island. Naturally, the proposal is unpopular with the businesses in the port area of Chios that would suffer if cruise visitors were to land elsewhere.

THE LIFE CYCLE OF CRUISE TOURISM

An aspect that needs approaching with caution when considering sustainability (literally, the ability to continue an activity) is that a business activity may flourish only for a brief time. Those who invest in developing a tourist destination may be disappointed to find that numbers cease to expand, and ultimately decline – with consequences in terms of the monetary investment and materials that have been expended on development, which will ultimately have social and environmental consequences.

It is useful, therefore, to determine the stage of development at a destination, when assessing the impacts of tourism (and specifically in this case, cruise tourism). Many authors [Cooper et al, 2008; Page and Connell, 2009] recognise Bulter's [1980] Tourist Area Life Cycle (TALC) as being a valid model to explain how a destination develops over time, moving through the stages of involvement, development and consolidation with a corresponding growth in tourist numbers. Graci and Dodds [2010] caution that the TALC cannot provide a typical evolution of an island destination, especially in a planning context. Choy [1992] and Agarwal [1997] support this, arguing that the exact angle of ascent in the TALC graph cannot be determined as "one size fits all". Indeed, there is evidence to support a very different tourist area life cycle occurring on Chios in comparison to Rhodes, despite the islands being of a similar size and in close proximity.

Rhodes evolved with the first charter flights in the early 1960s, attracting large numbers of tourists originating from UK and European consumer markets searching for an inexpensive packaged holiday [Visit Rhodes, 2013]. For summer 2013 Rhodes is expecting to attract in excess of 1.3 million tourists arriving by air, with a further 600,000 arriving as cruise tourists on 33 large capacity cruise ships, participating in day visit activities. These vast numbers of tourists in their various forms exceed the carrying capacity of the island at the height of the season [Pappas and Tsartas, 2009], degrading the tourism product and overstretching the infrastructure and natural resources. Obviously, day cruise visitors also cause a noticeable 'spike' in the load that tourists impose upon the destination.

Chios is largely unknown to the mass tourist markets of Europe, and instead attracts affluent Greek families, often with holiday homes, and Turks visiting on short excursions from the nearby Turkish mainland, only 10 km away. The island is expected to see fewer than twenty cruise ship visits during the 2013 holiday season, from five different ships with a maximum capacity of only 450 passengers [Seabourn 2013; Silversea, 2013] – although it is worth noting that Seabourn, in particular, describe this as an 'ultra luxury' cruise product, which may increase the value of each passenger to the local economy. Of course, a cruise tourist arriving at the island only stays for a few hours, but contributions from this source can be significant, if a fair share is allowed to permeate through to the host community.

When utilising Butler's [1980] TALC to determine the maturity of the destinations, Rhodes can be seen to be in the 'consolidation' stage, and arguably bordering on stagnation as the destination regularly reaches over-capacity, degrading the tourism product [Pappas and Tsartas, 2009]. In comparison, Chios has developed so as to attract a very different kind of higher spend consumer, albeit in limited numbers. In addition to the low level of visitors, comments from stakeholder interviewees confirm Chios to be at the 'involvement' stage of Butler's [1980] TALC. The tourism industry on Chios has developed at a much slower pace, and the island lacks the infrastructure that would be needed to serve the mass market, although in consequence much of the coastline remains in a highly desirable, undeveloped state that has largely escaped tourism [Lonely Planet, 2009].

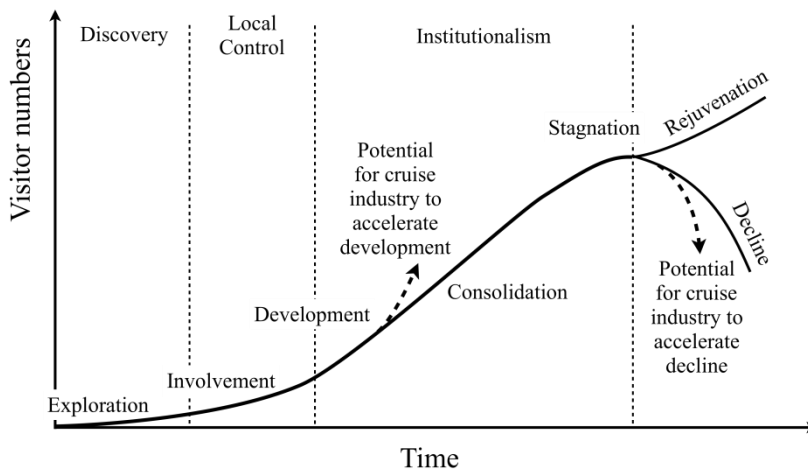


Figure 1: Tourist Area Life Cycle showing the cruise industry's potential to accelerate development, and decline (adapted from Butler [1980])

Cruise tourism should be pursued with caution, as its appeal as a sustainable income generator is questionable. It has the potential to skew the TALC because the mobile nature of the cruise product can overcome the normally slow process of development and consolidation. If a destination becomes popular, cruise visitor numbers can increase rapidly by the simple expedient of changing cruise itineraries from one season to the next, as Figure 1 demonstrates:

Destination-specific investment would remain relatively small, allowing cruise operators to sample a destination, and move elsewhere if it proves insufficiently profitable. In this sense, cruise ships are superior to land-based development, but introduce considerable variability that may leave local businesses struggling to meet capacity requirements without taking on considerable financial risk.

In addition to the TALC theory, there are further established concepts that can be utilised to develop an overall image of the development of tourism on Chios. Cooper et al [2008]

highlight that when searching for the allegations of socio-cultural impacts in tourist destinations, one of the major impacts on the host community occurs when they come into any kind of contact involving communication with tourists, either arriving to stay overnight or, it can be argued, via a cruise ship. This activity is reported as being a direct impact that can lead, over time, to irritation (as characterised by Doxey's [1975] Irritation Index.)

Brida et al [2012] have completed focused research involving destinations receiving cruise tourism, utilising successfully the fundamental theories devised by Butler [1980] and Doxey [1975] to determine the social-cultural impacts of tourism in Messina, Sicily. In Chios both the TALC and Doxey's Irritation Index can be utilised to demonstrate that not only is the island destination at the 'involvement' stage, the responses from the local host community taking part in the primary interviews, acknowledge 'euphoria' per the Doxey Irritation Index. Largely as a result of the continuing economic crisis in the Eurozone which has impacted many businesses in Chios, the host population is increasingly reliant on tourism and in particular, on the cruise tourist to supplement their income and the local economy.

It appears that cruise tourism on Chios is developing towards the next stage of both the TALC and Doxey's Irritation Index models, although other authors [Brida et al, 2012; Brida and Zapata-Aguirre, 2010] have argued that these models are only reliable when utilised retrospectively. In the case of Chios it seems reasonable to suggest that an accurate prediction can be made, in that the economy is moving towards reliance on tourism and consolidation, involving the cruise tourism industry in particular. The cruise industry may ultimately become a major cause of *annoyance* amongst the host population, particularly if larger cruise ships are able to land greater numbers of cruise tourists on the island in the future. Cruise tourism could develop to attract numbers that would test the carrying capacity of the island, as has been seen on Rhodes.

Conclusions

Chios is at a pivotal stage in its development, and the importance of cruise tourism has been magnified by wider economic issues. The islanders must resolve some difficult business decisions if they are to invest in a major port development, and even if successful in this they run the risk of substantially altering the character of the island.

It appears that stakeholders are largely unaware of the negative impacts that a large increase in cruise tourism could inflict on their island, and their lives. The host population were found to have only a limited regard for maritime environmental issues, and the current social impacts were largely considered to be of minor importance and easily addressed. Meanwhile, the people of Chios remain well-disposed to tourism, and few perceive any significant risk. As a result, developments that will permit increased cruise tourism appear likely.

Whilst an attractive solution in the short term, and especially in the current economic climate, the fostering of cruise tourism on Chios ought to be undertaken with care – taking into account the luxury positioning of the current product, and aiming to maintain or increase local revenue per passenger even as numbers increase. Offering a rare example of a largely unspoiled destination, it should be entirely possible to derive further income from both cruise operators and passengers.

Even when considered on a purely business level, investing in new port infrastructure is risky because there are no guarantees that with such facilities in place the island will attract larger cruise ships in sufficient numbers to repay the initial investment. Furthermore, there will be social changes for some in the host community, in the form of longer working hours and highly seasonal work, plus issues of congested roads and crowded amenities, while the environmental impacts of increasing cruise tourism in general will be borne by the much wider (or even global) community.

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