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*An International Multidisciplinary Journal of Tourism*

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*related to the socio-cultural life of the ancient society. With that in mind, a study is essential to carry out and to reveal the historical events that lie behind tourism objects with the aims of enriching insights of local people. Such an effort is undertaken as a support of local contents acquisition to be capable of extending the information of a tourism object for the locals.*

*The study aims to carry out the historical overview of Otanaha Fort as a supporting element of cultural tourism in Gorontalo. The researchers employed field survey and interview to obtain the data and folklore analysis to approach the research object. The result shows that the folklore of Otanaha Fort is a manifestation of features of social events of Gorontalo in the ancient times that depict the record of past events. The historical facts are further packaged in the form of imaginative fable for people to enjoy as an act of historical preservation. The evidence of the historical facts is observable by data tracking within the naming process of the objects, site or tombstone of influential figures of the story, preservation of address of traditional titles related to the figures, and distinct building techniques observable in the fort' architecture.*

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*Basically, many developed any developing countries need to expand tourism activities for accessing to the goals of national economic development and attracting foreign funds, therefore evaluating the efficiency of tourism industry can have significant help in recognizing the existed tourism potentials. The Chabahar zone in spite of numerous potential abilities in attracting domestic and foreign tourists and despite the fact that it is known as one of the important poles of tourism in Iran, but it is not so successful in attracting tourists. The present research has been provided to access to the efficiency of tourism industry in this area. For analyzing the information, the Data Envelopment*

*Analysis Method (DEA) have been used. According to the results, the technical, management and scale efficiencies are 0.58, 0.69 and 0.84 percent respectively. It is suggested to strengthen the marketing, advertising and doing appropriate transportation infrastructure by employing manpower and efficient and expert management.*

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*The EDEN project is an excellent option for destinations that do not have the necessary financial funds but want to develop tourism. It provides a chance for every tourist product to be advertised free of charge in the other EU Member States.*

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## EDITORIAL

The issue comprises eight (10) papers on various aspects of tourism. In the first paper **Nguyen Minh Huan** aimed to identify the most frequently cited hospitality scholars from 2006 to 2015. For this purpose two journals, *International Journal of Hospitality Management* and *International Journal of Contemporary Hospitality Management*, were reviewed. Then a productivity analysis was conducted based on the repeated authorship, author affiliation, and research contribution. In the second paper **Conceição Castro** detected and analyzed the most significant motives that may lead someone to start a business in a rural tourism destination. Family and personal success indicated as the most important motivators by the study. Then researcher surveyed the problems and barriers that entrepreneurs in Northern Portugal have to face. The research results identified bureaucracy, lack of financial support and information as the most important obstacles. Then **Zahed Shafiei and Manizheh Karoubi** explored the challenges and prospects of e-business adoption by travel and tourism SMEs in Iran. They also analyzed the role of government as a facilitator in the process of Information and Communications Technologies (ICTs) adoption by the SMEs. A mixed method research process that compines qualitative and quantitative research was employed to serve the research aims.

In the fourth paper, **José Francisco Perles-Ribes and Ana Belén Ramón-Rodríguez** interlinked the concept of smart tourism destinations (STDs) with sustainable tourism development. According to the authors, the concept of STDs is the first real opportunity to make sustainable tourism operational as the intensive use of technology involved in STD allows the continuous measurement of indicators related to sustainability. Then, **Sabira Nalakath and Moli P. Koshy** are concerned with the role of the supply-side stakeholders in tourism destination's competitiveness. The study presents an analytical framework grounded on social exchange theory according to which destination competency and stakeholder destination fit is significantly important for stakeholder engagement in the destination. In the sixth

paper, **Aleksa Š. Vučetić and Snežana Milošević** aimed to detect on the influence of employees' working age in the organization on the perception of the importance of basic tourism policy types in the sector of cultural tourism. The study was concentrated in the case of Montenegro. In what follows, **Moh. Karmin Baruadi, Sunarty Eraku and Syahrizal Koem** attempted to reveal the historical facts behind tourist objects to enrich the knowledge of the locals. They employed a field survey and interview to obtain the data that would produce the historical overview of Otanaha Fort that constitutes a supporting element of cultural tourism in Gorontalo. The results show that the folklore of Otanaha Fort was a manifestation of features of social events of Gorontalo in the ancient times that depict the record of past events.

Subsequently, **Nuno Baptista conducted a research to** present the application of social network analysis in tourism marketing studies. theoretical benefits, main contributors and core research streams of this approach are examined and analyzed. In the ninth paper, **Ali Sardar Shahraki and Saba Baharvandi** studied the case of Chabahar zone where in spite of its potentials in attracting domestic and foreign tourists and to become an important pole of tourism in Iran, it has not been successful in attracting tourists. The Data Envelopment Analysis Method (DEA) was adopted and points of improvement were highlighted. Finally, Krasimira Yancheva and Desislava Dimitrova presented the European Destinations of Excellence (EDEN) initiative and analyzed the EDEN destinations of Bulgaria. This paper also mentions the opportunities to promote and develop the EDEN destinations of Bulgaria as a way to improve sustainable development of tourism in the country.

## A CITATION ANALYSIS OF HOSPITALITY RESEARCH

**Nguyen Minh Huan**

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*This paper identified the most frequently cited hospitality scholars in periods from 2006 to 2015. The two refereed hospitality journals, International Journal of Hospitality Management and International Journal of Contemporary Hospitality Management were the focus of analysis. The results of a productivity analyses pertaining to repeat authorship, author affiliation, and research contributions are presented. Findings of the paper contribute to providing insights on multidisciplinary structure of hospitality research using bibliometric technique.*

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**Keywords:** *Hospitality management, Bibliometrics, Citation analysis.*

### INTRODUCTION

Together with tourism research, the epistemology of hospitality research is a topic of interest of many scholars. Brymer, R (1995) described hospitality as “an umbrella term used to encompass the many and varied business that cater guests”. It can be seen that hospitality is much larger than most of other industries. Moreover, hospitality research has developed for the past decades (Lugosi et al., 2009). In recent years, hospitality has been defined as an independent academic category in SSCI, reflecting the development of the hospitality industry. Therefore, some reviewers have highlighted the

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increasing complexity of academic papers and called for more efforts in various aspects including methodological issues (Mohammed et al., 2015).

At present, there are many approaches to understand the epistemology and knowledge structure of a general field, one of which is to analyze scholars and contents of publications. For the past two decades, there have been many efforts to identify the most productive and influential hospitality scholars, institutions and publications, including efforts to rate hospitality journals, individual scholars and institutions based on productivity and quantity of citations (Howey et al, 1999; Kim et al, 2009; Köseoglu et al, 2015). By using bibliometric technique to identify the most influential researchers and journals, hospitality research knowledge domain can be understood better.

Analyses on progress in knowledge and theory do not only provide understanding on the development of ideas and interpretations but also highlight effects of academic forces and knowledge formation trends (Belhassen & Caton, 2009). Besides that, Botterill (2001) stated that analysis on epistemology can be a useful means to develop general understanding on how knowledge unfolds as well as its impacts on intellectual and education products of the researched field.

Researching recent citations in hospitality, this paper aims at continuing to expand the analysis on citations of articles in leading journals in a hospitality field from 2006 to 2015. In particular, the research expects to identify such contents as the scholar who was cited most for the above period and the relationship between scholars and works which are much cited in two hospitality research journals. This paper is structured as follows. First of all, data is analyzed from the database source which is considered as the most suitable, i.e. SSCI and the methodology used. Next, results of co-citation analyses in hospitality area as well as visualization of the ‘intellectual structure’ of the discipline are shown. The final part summarizes main conclusions, limitations and future research direction.

## **LITERATURE REVIEW**

### **Academic foundations of hospitality research**

Hospitality research has developed gradually in terms of scope, nature, structure and closeness for the past years. Probably this is to try to catch up with fluctuations and research demands of this industry relating to diversity of the topic (Pritchard & Morgan, 2007). There are many debates on identifying scope of hospitality in the academic field. Therefore, many ideologies have developed to make hospitality research become a more general concept. Because of the importance of hospitality research, the development and experiment of many ways with many different methods is requisite for reflecting the development of subfields. Obviously, this can create significant understandings on development of hospitality research such as multidisciplinary approach. It can be seen clearly that in future, hospitality research will be able to combine, apply any method. The most important thing, however, is that such method has to increase the reliability, innovation and brings about better research results for academic research (Singala, Christou, & Gretzel, 2011).

### **Citation and co-citation analysis**

Citation analysis is a branch of bibliometric analysis. Citation analysis studies the impact and quality of a scientific article, an author, or an institution based on the number of times the article and/or author is cited by others. In addition to mapping academic foundations, it is the basis for discovering what researchers think of their colleagues (Kolata, 1991). There are two methods of citation analysis, i.e. basic and advanced analysis. The basic citation analysis method is simply to count cited journals, authors or articles. Advanced citation analysis, also known as co-citation analysis, is an

investigation of the relationship between journals, articles, or authors to explore patterns within a particular intellectual (Baker, 1990). Co-citation analysis is a technique aiming at providing an insight on intellectual structure of a research field. Basis for co-citation analysis is that pairs of documents which often appear together in the list of references can have one thing in common. When two authors or papers are cited regularly together, it is likely that their ideas relate to each other (Pasadeos, Phelps, and Kim, 1998). Co-citation analysis has proven to be a useful experimental technique for describing the intellectual structure of many fields, including education (Özçınar, 2015), marketing (Backhaus, Lügger & Koch, 2011), operations management (Pilkington, & Meredith, 2009), information science (Zhao, & Strotmann, 2008), strategic management (Nerur, Rasheed, & Natarajan, 2008), and tourism (McKercher, 2008), etc. It is a common method in research to analyze citations and articles in leading journals in the same field.

### **Citation and co-citation analysis research related to hospitality industry**

There has been a lot of research making efforts to determine the most productive and influential hospitality scholars based on productivity and number of citations. Howey et al. (1999) compared cited journals in articles published from 1994 to 1996 among the top three tourism-oriented journals (Annals of Tourism Research, Tourism Management, and Journal of Travel Research) with hospitality-oriented journals (International Journal of Hospitality Management, Hospitality Research Journal and Cornell Hotel and Restaurant Administration Quarterly). The results of the research on relationship between the six journals above showed that there were more citations occurring within disciplines than across disciplines. Kim et al. (2009) inherited Howey et al. (1999) study by research from 1994 to 2005. They concluded that there was a systematic development of both

tourism and hospitality. In addition, research fields do not much depend on the others disciplines for development.

A few studies exist in hospitality conducted via citation and co-citation analysis by Hu and Racherla (2008), Ye et al. (2012). Köseoglu et al (2015) investigated the use of citation and co-citation analysis in hospitality research from 1992 to 2013 in Turkey. The results showed that over one-half of the article comes from publications engaging outside of the T/H area. García-Lillo et al. (2016) analyzed available literature on hospitality management from all the research papers published in International Journal of Hospitality Management (IJHM) from 2008 to 2014. This paper addresses this need by using co-citation analysis to reveal the intellectual structure of the field of hospitality. All the research was conducted through analysis of citations including an author co-citation, co-author, and co-word.

## **METHOD**

### **Database and journal selection**

The articles published on journals are considered as 'certified knowledge' and references from these articles are considered reliable through the use of bibliometric analysis (Ramos-Rodriguez and Ruiz-Navarro, 2004). So SSCI database has been selected for its reputation and influence in academics. Its influence is so great that it is often regarded as the definitive word to determine the value of a journal and / or the contribution of scholars doing research. The study focuses on hospitality research and does not identify tourism research which rarely or never be published in the hospitality literature. Hence, the key word, title, topic, and content are limited to the scope of hospitality themes included in the SSCI.

This research provides a citation analysis of 10 years of hospitality research using reference lists of articles published in International

Journal of Hospitality Management (IJHM) and International Journal of Contemporary Hospitality Management (IJCHM) from 2006 to 2015 as the source data. The time frame is limited for convenience reason and bibliometric research often collects data for about five or ten years.

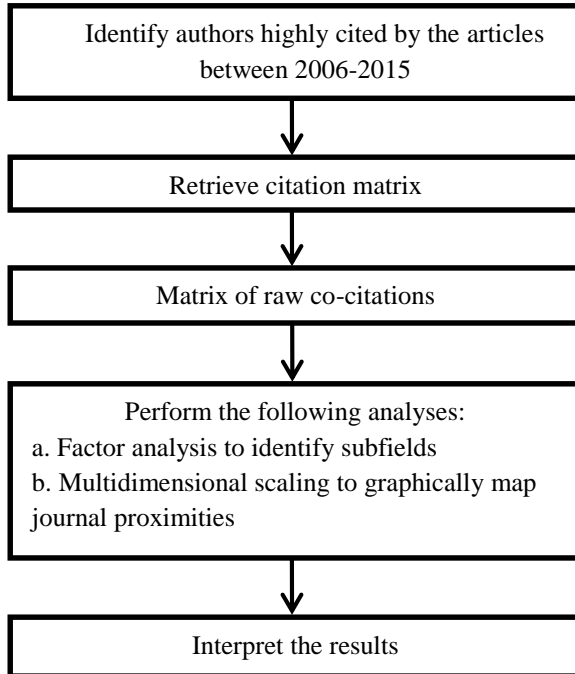
There are several reasons for that this analysis is limited to IJHM and IJCHM. Firstly, they are the most prominent and most cited journal in the hospitality field (Chang & McAleer, 2012). Secondly, scientific journals are often considered a key communication foundation for researchers (Macharzina et al., 2004). Thirdly, the data used for this research was collected from a secondary database and restricts the availability of necessary reference list based on relationship analysis. Finally, the journals analyzed in this article are "mainstream" with a wide theme and geographical scope.

## **Data collection and analysis**

Citations from all the articles are put into a spreadsheet program (Excel) to eliminate possible misspellings in SSCI database, and sorted by the number of citations. Then, the author's name, year of publication, title, name of journal cited from each article are determined. Excel spreadsheets are used to collect data for the co-citation analysis. Citations and co-citations analysis is done through identification of Multidimensional scaling factors using SPSS software. Before analyzing the data, the article attempts to standardize inconsistent items, such as how to write the author's name, citation details, or publication years. These errors occur because of errors in the data capturing process and variation of title abbreviation. The data is modified to ensure that it won't affect the analysis results. The process of data analysis is as follows: first, reveal information about the frequency of articles by years and journals. Then, analyze the citations and co-citations. References used in articles are counted to identify characteristics of citations and co-citations, including important publications and journals with impacts

on hospitality literature. Figure 1 shows the steps used in this research.

**Figure 1** Steps used in co-citation analysis



## **RESULTS AND DISCUSSION**

### **Co-citation analysis**

This section uses a matrix based on the frequency of co-citations from two hospitality journals as its input (McCain, 1990). This matrix is the basis for many following types of analysis. First, factor analysis is done to extract the important subgrouping in the hospitality

research. Then multidimensional scaling (MDS) analysis is used to create visual images (maps) from the matrix. This map reflects the epistemology of hospitality research based on co-citations between articles. With the aid of both factor analysis and multidimensional scaling, the group of scholars are analyzed, from which some key conclusions about the multidisciplinary structure of hospitality from 2006 to 2015 can be drawn.

### **Factor analysis**

Factor analysis is an analysis technique in SPSS which is applied in this research to complement MDS. This technique can be explained as detecting correlations between initial variables through the creation of some variables or factors. In other words, it is used to reduce the number of data generated by factors and factor loadings of initial information gathered from hospitality journals. Factor loadings indicate the extent to which the author belongs or loads on predetermined factors based on research questions. Therefore, the factors are considered subfield when the theory background is collected to check the works of authors who load within the factor. The matrix of raw co-citation is analyzed using analysis on the key element with varimax rotation (replacing missing values with the average value). The eigenvalue is an indication of the amount of variance explained by a factor (Nerur et al., 2008).

Table 1 and 2 provides a list resulting from the citation analysis of the documents most often cited by research papers published in The International Journal of Hospitality Management (IJHM) and International Journal of Contemporary Hospitality Management (IJCHM) during the period analyzed.

**Table 1** List of the documents most often cited from IJHM (2006-2015)

*TOURISMOS: AN INTERNATIONAL MULTIDISCIPLINARY JOURNAL OF  
TOURISM*

Volume 13, Number 1, pp. 01-25

UDC: 338.48+640(050)

Ranking	Most-cited documents	Number of citations	Ranking	Most-cited documents	Number of citations
1	Baron, 1986	27274	36	Churchill, 1982	689
2	Hu, 1999	15935	37	Youndt, 1996	678
3	Ajzen, 1991	12361	38	Bolton, 1991	654
4	Fornell, 1981	11290	39	Sweeney, 2001	603
5	Barney, 1991	9646	40	Smith, 1999	598
6	Bentler, 1980	6474	41	Tax, 1998	578
7	Armstrong, 1977	4167	42	McWilliams, 2000	562
8	Morgan, 1994	3919	43	Arnould, 1993	553
9	Parasuraman, 1988	3354	44	Ashforth, 1993	548
10	Parasuraman, 1985	3044	45	Carman, 1990	536
11	Zeithaml, 1988	2289	46	McGuire, 1988	532
12	Huselid, 1995	2051	47	Garriga, 2004	514
13	Oliver, 1980	2001	48	Brady, 2001	502
14	Zeithaml, 1996	1864	49	Hartline, 1996	477
15	Cronin, 1992	1613	50	Westbrook, 1991	470
16	Oliver, 1999	1237	51	Morris, 1996	452
17	Bitner, 1990	1101	52	Wong, 2002	436
18	MacDuffie, 1995	1095	53	McWilliams, 2006	426
19	Cronin, 2000	1079	54	Bitner, 1994	421
20	Bitner, 1992	1064	55	Brotheridge, 2002	420
21	Waddock, 1997	1019	56	Aupperle, 1985	409
22	Delery, 1996	1009	57	Solomon, 1985	404
23	Bitner, 1990	1008	58	Baker, 2000	393
24	Crosby, 1990	1006	59	Luo, 2006	379
25	McWilliams, 2001	956	60	Pugh, 2001	363
26	Anderson, 1994	955	61	Bebchuk, 2009	357
27	Garbarino, 1999	927	62	Bolton, 1999	356
28	Fornell, 1992	844	63	Yang, 2004	298
29	Ichniowski, 1997	839	64	Carroll, 2010	277
30	Becker, 1996	838	65	Lichtenstein, 2004	267
31	Grönroos, 1984	759	66	Cochran, 1984	259
32	Boulding, 1993	748	67	Sweeney, 1999	259
33	Delaney, 1996	743	68	Maignan, 2004	254
34	Heskett, 1994	698	69	James, 1989	250

**Table 2** List of the documents most often cited from IJCHM (2006-2015)

Ranking	Most-cited documents	Number of citations	Ranking	Most-cited documents	Number of citations
1	Baron, 1986	27274	26	Jaworski, 1993	1512
2	Hu, 1999	15933	27	Teece, 2007	1126
3	Fornell, 1981	11288	28	Hart, 1995	1118
4	Barney, 1991	9644	29	Slater, 1995	1117
5	Anderson, 1988	8762	30	Cronin, 2000	1079
6	Teece, 1997	5497	31	Delery, 1996	1009
7	Wernerfelt, 1984	4600	32	Fornell, 1982	961
8	Armstrong, 1977	4166	33	Anderson, 1994	955
9	Morgan, 1994	3919	34	Garbarino, 1999	927
10	Rotter, 1966	3848	35	Anderson, 1993	899
11	Jensen, 1986	3704	36	Mulaik, 1989	890
12	Churchill, 1979	3597	37	Hurley, 1998	868
13	Parasuraman, 1988	3354	38	Becker, 1996	838
14	Dyer, 1998	2891	39	Reed, 1990	802
15	Eisenhardt, 2000	2722	40	Delaney, 1996	743
16	Rosen, 1974	2692	41	Helfat, 2003	731
17	Dierickx, 1989	2314	42	Mahoney, 1992	729
18	Zeithaml, 1988	2291	43	Rumelt, 1991	690
19	Peteraf, 1993	2235	44	Oliver, 1997	634
20	Vargo, 2004	2219	45	Sweeney, 2001	604
21	Huselid, 1995	2051	46	Carman, 1990	536
22	Zeithaml, 1996	1864	47	Cronin, 1994	505
23	Narver, 1990	1846	48	Salanova, 2005	397
24	Kohli, 1990	1799	49	Lam, 2004	368
25	Grant, 1991	1670	50	Yang, 2004	298

Principal components with oblimin rotation were employed to extract the key generalizations/ factors and their correlations. Only factors with a minimum eigenvalue (or latent root) of 1 were extracted. Eigenvalue is an indication of the amount of variance explained by a factor (Hair, Anderson, and Tatham, 1998). Six factors were extracted from IJHM and three factors from IJCHM for the years 2006-15. To

be consistent with other co-citation studies, only authors with loadings above  $\pm 0.4$  were included in a factor. Tables 3 and 5 summarize the factors and their relationships. From the results, table 4 and 6 presents main themes identified in the factor analysis of 2 journals.

**Table 3** Factors extracted from IJHM (2006-2015)

	Factor 1	Factor 2	Factor 3	Factor 4	Factor 5	Factor 6
Sweeney	.724					
Sweeney.b	.679					
Zeithaml.b	.655					
Baker	.642					
Cronin.b	.629					
Bolton.b	.607					
Cronin	.596					
Yang	.578					
Grönroos	.556					
Brady	.550					
Parasurama	.547					
n.b						
Anderson	.520					
Boulding	.499					
Zeithaml.a	.495					
Bitner	.472					
Heskett	.462					
Fornell.b	.460					
Oliver	.458					
Churchill	.446					
Bolton	.417					
Morris		.974				
Wong		.952				
Brotheridge		.950				
Hu		.940				
Ashforth		.887				
Ajzen		.886				
James		.821				
Baron		.820				
Fornell		.573				
Luo			.998			
Sen			.993			
Maignan			.977			
Lichtenstei			.930			
n						
Garriga			.926			

	Factor 1	Factor 2	Factor 3	Factor 4	Factor 5	Factor 6
McWilliams.b			.925			
McWilliams			.922			
Carroll			.912			
McGuire			.895			
Waddock			.895			
McWilliams.c			.889			
Aupperle			.888			
Cochran			.866			
Bebchuk			.638			
Delaney				.940		
Huselid				.934		
Delery				.928		
Youndt				.927		
Becker				.925		
Macduffie				.921		
Ichniowski				.908		
Barney				.838		
Smith				-.566		
Westbrook				-.447		
Bitner.b				-.440		
Oliver.c				-.424		
Arnould				-.420		
Pugh					.555	
Bitner.d					.525	
Hartline					.522	
Solomon					.493	
Morgan						-.812
Garbarino						-.754
Crosby						-.708
Armstrong						-.662
Oliver.b						-.460
Variance explained	39.927	9.751	8.555	2.878	1.602	1.213
Percent of total variance explained	59.887	74.889	88.050	92.478	94.942	96.809

Total variance explained: 96.809%

Factor 1 contains the following group of 20 research papers.

Nevertheless, it is possible to distinguish three sub-groups within this

factor. The first of the sub-groups identified is shaped by the works of Sweeney (2001), Baker (2000), Yang (2004). These articles focus their attention in the perceived value understood as one of the main antecedents of customer satisfaction. The second sub-group would include the following works related to the stream of research on service quality developed within the context of service marketing: Zeithaml (1988), Cronin (1992), Bolton (1991), Grönroos (1984), Brady (2001), Parasuraman (1988), Boulding (1993). The third sub-group brings together the works of Anderson (1994), Oliver (1980), Churchill (1982), Bolton (1999), all of which deal with customer satisfaction. The concept of satisfaction is analyzed from two distinct perspectives in the literature about marketing: a cognitive side which understands this term as an evaluative judgment resulting from the comparison between consumer expectations and the perception of the value of the product/service received; and another emotional perspective which sees satisfaction as an emotional state derived from the experience with consumption.

**Table 4** Main themes of IJHM identified in the factor analysis.

	Themes
Factor 1	Studies on perceived value as antecedent to behavior intentions Service quality, consumer satisfaction
Factor 2	Emotional labor
Factor 3	CSR and performance
Factor 4	Human resource management
Factor 5	Service encounter
Factor 6	Relational marketing

The second of these conglomerates or Factor 2 would be shaped by the works of Morris (1996), Wong (2002), Brotheridge (2002), Ashforth (1993), James (1989). All these articles are related to the emotional labor. Service delivery tasks characteristically require direct contact with the client during most of the working hours. That

is why the employees who work with customer must control their emotions during their labor interaction.

The third of these clusters or Factor 3 identified is shaped by the works of Luo (2006), Sen (2006), Maignan (2004), Lichtenstein (2004), Garriga (2004), McWilliams (2001), Carroll (2010), McGuire (1988), Waddock (1997), Aupperle (1985), Cochran (1984), Bebchuk (2009) about the impact that corporate social responsibility and the development by firms of a socially responsible behavior may have on business performance.

In the case of Factor 4 brings together the works of Delaney (1996), Huselid (1995), Delery (1996), Youndt (1996), Becker (1996), MacDuffie (1995), Ichniowski (1997). The source-works included in this conglomerate, all of them of a human resource management, are situated amongst the most cited works by the literature in the research developed here. There is broad agreement that a strategic approach to HRM involves implementing and designing a set of internally consistent policies and practices that ensure a firm's human capital (employees' collective knowledge, abilities, and skills) contributes to the achievement of its business objectives.

As for Factor 5, the source-works included in this conglomerate deals with what is known in the service context as service encounter. In particular, it contains 3 research papers: the works of Pugh (2001), Bitner (1990), Solomon (1985). These authors recognize that consumers react intensely to service failures. The recent and wide-ranging focus on service encounter satisfaction and service quality speak to both the importance and the complexity of the issues. First and foremost, customer satisfaction depends directly on the management and monitoring of individual service encounter. The management of individual encounters is nested within broader managerial issues of organizational structure, philosophy, and culture that also can influence service delivery and ultimately customer perceptions of service quality.

Finally, the last of these conglomerates or Factor 6 identifies gathers the source-works of Morgan (1994), Crosby (1990), Armstrong (1977), both of them belonging to one of most recent research streams in the context of marketing: “relational marketing”. The emphasis in relational marketing is on long-term, mutually beneficial relationships between sellers, buyers, and industrial networks, interaction to build and develop these relationships, and a focus on variables such as trust, commitment, cooperation, and dependence.

**Table 5** Factors extracted from IJCHM (2006-2015)

	Factor 1	Factor 2	Factor 3
Salanova	.975		
Yang	.927		
Zeithaml	.923		
Garbarino	.922		
Mulaik	.921		
Lam	.916		
Anderson.c	.911		
Hu	.901		
Zeithaml.b	.899		
Anderson	.897		
Cronin	.891		
Sweeney	.883		
Parasuraman	.878		
Anderson.b	.878		
Rotter	.873		
Fornell.b	.850		
Fornell	.848		
Morgan	.840		
Rumelt	-.832		
Reed	-.824		
Jensen	-.818		
Churchill	.758		
Cronin.b	.754		
Teece	-.746		
Carman	.677		
Vargo	.581		
Jaworski		.991	
Slater		.991	
Hurley		.961	
Rosen		-.675	
Armstrong		.564	
Delaney			.951
Delery			.925
Becker			.912
Huselid			.908
Variance explained	21.795	5.858	3.657
Percent of total variance explained	62.270	79.007	89.456

Total variance explained: 89.456%

**Table 6** Main themes of IJCHM identified in the factor analysis

Themes	
Factor 1	Perceived quality of service, customer satisfaction, studies on structural equation models,
Factor 2	Market orientation
Factor 3	Human resource management

With regard to Factor 1, one can also identify three different sub-groups closely related to one another as well. The first of the aforementioned sub-group brings together the works of Yang (2004), Zeithaml (1996), Cronin (2000), Parasuraman (1988), Cronin (1994), Carman (1990). All these articles are related to the perceived quality of service. The second of the sub-groups identified is shaped by the works of Garbarino (1999), Lam (2004), Anderson (1994). All of which deal with customer satisfaction. The third of the sub-groups identifies gathers the source-works of Anderson (1988), Fornell (1981) about the studies on structural equation models.

Factor 2 contains the following group of research works: Jaworski (1993), Slater (1995), Hurley (1998). These research papers focus market orientation. Researchers have emphasis on delivering superior quality products and services to customers. Because customer expectations and needs continually delivering consistently high-quality services, and products require ongoing tracking and responsiveness to changing marketplace needs, i.e., being market-oriented.

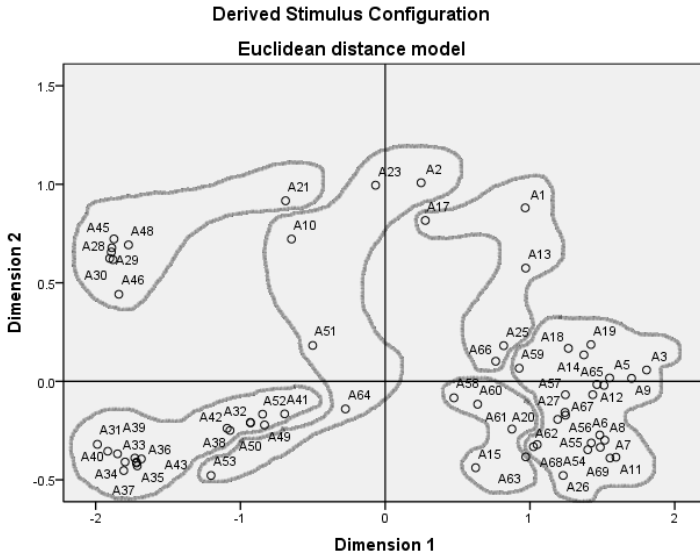
The third of these conglomerates or Factor 3 would be shaped by the works of Delaney (1996), Delery (1996), Becker (1996), Huselid (1995). All these articles are related to human resource management. The importance of (HRM) as a competitive tool and the relationship between organizational performance and human resource

management has been the subject of systematic research. Authors have identified and examined certain HRM practices as crucial to developing organizational competitive advantage (e.g. see Delery, 1996, Becker, 1996). Researchers also found connections between HRM and various measures of organizational performance (e.g. see, Huselid, 1995, Delery, 1996).

### **Multidimensional scaling (MDS)**

Multidimensional scaling is a data reduction procedure that allows us to create a map using the similarities, or dissimilarities between subjects (Wilkinson, 2002). In this case, the subjects of interest in this research include citations and co-citations in 2 hospitality journals. The correlations found in the 2 journals are used to draw a 2D graph of the authors cited together. Specifically, the points are placed on the map based on the proximity in co-citation matrix (where the high values reflect the high similarity). Points representing authors with high similarity will be located close to each other, while the points representing authors with a relatively lower similarity will be located further from each other in the map. It allows us to visualize the theoretical distance between various academic topics of the research (Nerur et al., 2008).

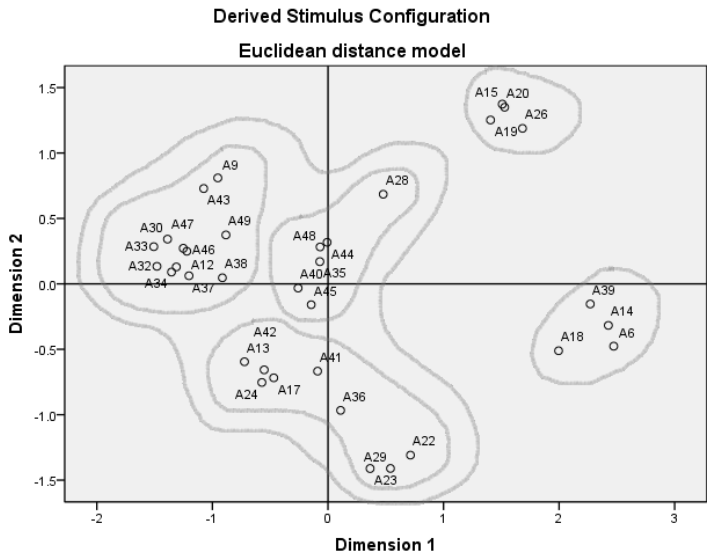
**Figure 2** Academic structure of IJHM (2006-2015)



Stress value is 0.07107. Proportion of variance (RSQ) is 0.98278

The evolution of the field of study may be discerned by examining changes in the temporal configuration of such maps. The stress value (0.07107, lower than an acceptable value 0.2) and  $R^2$  (0.98 for two-dimensions) showed an outstanding fit for the data (McCain, 1990). As a result, two large groups emerged from right to left on the MDS. Group 1 with most documents from factor 1, 4, 5, 6 and group 2 with documents from factors 2 and 3.

**Figure 3** Academic structure of IJCHM (2006-2015)



Stress value is 0.06033. Proportion of variance (RSQ) is 0.98553.

The stress and R2 values are an indication of how good the fit is. The stress values for all the periods are below 0.2, which suggests an acceptable fit for co-citation data (stress value is 0.06033; R2 is 0.98553). While a two-dimensional solution may not have the explanatory power of a solution involving higher dimensions, it has the advantages of being easy to map and interpret. Despite the fit being fair, at best, a two-dimensional solution is a reasonably good approximation of what one might get from higher dimensions. Figure 2 show that two large groups emerged from left to right on the MDS. Group 1 with most documents from factor 1, and group 2 with documents from factors 2 and 3.

## **CONCLUSIONS, LIMITATIONS, AND FUTURE RESEARCH**

This article aims at analyzing the epistemological structure of the discipline in the hospitality field using the bibliometric method. This article mainly focuses on the use of the experimental method – co-citation analysis - to explore the main research groups in the hospitality sector, namely analysis of articles published in 2 hospitality journals in the time frame from 2006 to 2015. This method provides a clear tool to identify new directions in current research and model, as well as puts the paper of the author in a specific research field. Moreover, this method can be very useful for new researchers in identifying the most significant contributions to the scientific discipline.

This research is limited to three major hospitality journals as well as defines the analysis period (2006-2015) to carry out experimental research leading to the limited scope of the result because it cannot give us an overview of the interdisciplinary structure in hospitality research. Obviously, there will be some significant changes in the result and conclusions if the scope of the journals included in the analysis or the analysis period is extended. Therefore, future research can certainly add value to the evaluation by including the variety of journals and using a wider variety of analysis methods. Among many ways to evaluate the contributions to a particular field, the citation analysis is a popular method used in the social sciences industry. It can be argued that citation analysis describes more accurately an individual, and thus institutions that scholars are related to, and influences on academic development. The reason to set a value on citation analysis is that not only the article of an individual cited but also contributions to the specific research field.

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## RURAL TOURISM IN NORTHERN PORTUGAL – MOTIVATIONS AND BARRIERS

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*Tourism in rural areas boosts economic dynamism, turning them more attractive, diversifying economic activities, creating jobs and wealth. With the importance that micro and small companies play on economic growth, particularly in rural areas, the objective of this article is to analyze the main motivations to start a business in rural tourism and the problems and barriers faced by these entrepreneurs in Northern Portugal. With the results of a questionnaire an exploratory factor analysis was conducted and the results show that the main motivations to create the business were related to family and success. Using a cluster analyses owners were grouped in three segments. They encountered some restrictions in the start-up process as bureaucracy, lack of financial support and information.*

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**Keywords:** *Rural tourism – Entrepreneurship – Cluster Analysis - North of Portugal*

### INTRODUCTION

Rural tourism, more characteristic of the North and Centro regions of Portugal, has survived mainly due to the natural heritage and some cultural traditions. This type of tourism has a long history in Portugal. Characteristic of families from high social and economic classes on holidays, lost its importance with the fashion of the beaches, diverting tourism to the coast. With the widespread increase

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in leisure time, the democratization of tourism (Fernandes, 2002) and subsequent technological development of transports and communications, which introduced greater mobility, give rise to new flows toward the countryside. This trend was accelerated with the strengthening of accessibility at national level and of environmental concerns.

Rural tourism, characterized by family hospitality, located in rural regions, natural and/or protected spaces, allows a more direct contact with the nature, people, their culture, monuments, traditions, and is a way to diversify the national tourism and to promote local development. For Cadima, Freitas, and Mendes (2001: 16), rural tourism in Portugal “has effective qualities to support local development dynamics, that is, can be a useful instrument to generate alternatives for local/regional economies, when it valorizes endogenous resources and boost the recovering of multi-functionalities of these territories”. Rural tourism can alleviate some economic and social problems associated with the lack of economic opportunities and population decline that has accompanied the reduction of agricultural activity. Rural tourism can be an alternative to increase income for family farms (Riva and Bertolini, 2017).

Initiated experimentally in the 70's (in Ponte de Lima, Vila Viçosa, Castelo de Vide and Vouzela – Northern regions), and legally classified in the 80's, in 2015 rural tourism represented 30% of total accommodation in Portugal and Northern Portugal had the highest capacity of accommodation (37.8% of total establishments), the highest number of guests (33.5%) and overnights (30.2%) (INE, 2016).

Recently, the economic literature has emphasized the phenomenon of business star-up and entrepreneurship, by the positive impact on the formation of wealth and employment (Acs et al., 2005), mainly of small enterprises. Tourism in rural areas is important for its revitalization and development (Ateljevic et al., 1999; Dana, Gurau, and Lasch, 2014; Gomes and Renda, 2016; Lai, Morrison-Saunders, and Grimstad, 2017; Lane and Kastenzholz, 2015; Pato, 2016; Polo-

Peña, Frías-Jamilena, and Rodríguez-Molina, 2012; Thomas, Shaw, and Page, 2011).

Although small enterprises typify the tourism sector and the importance of these companies to diversify regional and local economies, the research related to small enterprises in rural tourism is still incipient in Portugal.

The aim of this article is to study the main motivations for starting a business in rural tourism in the North of Portugal, the characteristics of these businesses and barriers to entrepreneurship.

## LITERATURE REVIEW

Entrepreneurs have different motivations for starting a new business. Environmental conditions, such as job insecurity or unemployment, the need to increase income or dissatisfaction in their work can motivate individuals to become entrepreneurs – the *push factors* or extrinsic motivations. However the business can be started by intrinsic motivations or *pull factors*, such as the desire for success, power, to be his own boss, business opportunity or even by retirement and people are pulled into entrepreneurship because they recognize an opportunity that can increase their income or their independence (Amit and Muller, 1995; Dinis and Ussman, 2006; Glancey and Pettigrew, 1997; Riva and Bertolini, 2017; Russell and Falkner, 1999; Set et al., 2015).

More recently, and in particular in the tourism sector, lifestyle has emerged as an important motivation for entrepreneurship, and it is also a pull factor. In many cases, businesses are created to provide a more adequate lifestyle, in which family needs, income, and the way of life itself are weighted (Ateljevic and Doorne, 2000; Baumgartner, Pütz, and Seidl, 2013; Dawson, Fountain, and Cohen Dawson 2011; Lai et al., 2017; Marques and Cunha, 2013; Stefanović, Ranković, and Prokić, 2011; Sun and Xu, 2017). Bransgrove and King (1996), concluded that the main objectives of small tourism businesses in

Victoria, Australia, either rural or urban, are related to stimulus or challenge, business opportunity, lifestyle and long-term financial gains, although in rural areas lifestyle goals were more frequent. In rural areas, Frater (1983) and Pearce (1990) also highlighted the motive for improving social life.

Great effort has been devoted to motivational structures of small businesses, but research for rural tourism enterprises is not so extent.

Getz and Carlsen (2000) for family and owner-operated businesses in rural tourism and hospitality sector in rural Western Australia concluded that they started the business mainly for living in the right environment and enjoying a good lifestyle. Moreover, the same authors, Getz and Petersen (2005), in two resort areas (Canmore in Canada and Bornholm in Denmark) determined that the main motivations were, in Canmore, to be challenged, to be financially independent, to live in the right environment, to be their own boss, and to enjoy a good lifestyle; in Bornholm are to enjoy a good lifestyle, to be their own boss, to live in the right environment, to become financially independent and to meet interesting people.

About motivation for agri-tourism entrepreneurship, the desire for independence has been referred in several studies (Busby and Rendle, 2000; McGehee and Kim, 2004; McGehee, Kim, and Jennings, 2007), the contribution to the community (Getz and Carlsen, 2000; McGehee et al., 2007) and a way to diversify the farm activity (Lobo et al., 1999; McGehee and Kim, 2004; McGehee et al., 2007), additional income and fully utilize the resources available (McGehee and Kim, 2004). Castrillon et al. (2011) for rural tourism in Galicia, Spain, highlight the economic motivations, particularly for women.

In developing countries, Banki and Ismail (2015), for the owners of family tourism microenterprises in Obudu Mountain, Nigeria, the motivations for starting the business were mainly financial: to take advantage of tourism development and to get a profit. Jaafar et al. (2011) in small and medium hotels in Malaysia found that the most important goals for starting the business were keeping the property in

the family and to allow to become financially independent, followed by to be challenged, to make a lot of money, to gain prestige, to enjoy a good lifestyle and to live in the right environment.

For rural tourism in Douro, Portugal, Pato (2016) concluded that the primary motivation to start the business was the recovery and the preservation of the built heritage. For this author, this fact allied with the short time that the majority spent in managing their businesses explain the scarce tourist entertainment activities based on local culture and tradition. Gomes and Renda (2016) also study the main motivations in rural tourism in the Centro Region of Portugal. Although the motives presented in several studies are not the same and consequently not comparable, the most pointed by respondents of that region were the promotion of the natural beauty, the contribution to its development and in third position the recovery and preservation of the heritage.

To the author best knowledge very few publications are available in literature that discuss the formation of clusters based on motivations to start a rural tourism venture. Getz and Carlsen (2000) clustered the entrepreneurs in two groups labeled “family-first” and “business-first”. Getz and Petersen (2005) defined different groups: in Bornholm, those who started-up the business for lifestyle, challenge, money, and family, and in Canmore also for prestige. For small restaurants in China Chen and Elston (2013) define three segments based on motivation: autonomy seekers, family protectors and financial reward seekers.

## **METHODOLOGY**

In this study it were included country house tourism accommodation and tourism enterprises in rural areas according to Decree-Law nº 39/2008 of March 7, changed by the Decree-Laws numbers 228/2009 of September 14 and 15/2014 of January 23. According to these Decree-Laws country tourism accommodation are

“Family-run establishments located in old, private buildings that for their architectural, historic or artistic value represent a certain era, notably palaces and manor houses, located in [...] rural areas...” (article 17). Tourism enterprises in rural areas are “Establishments intended to provide accommodation services to tourists in rural areas that have for their operation an appropriate set of facilities, structures, equipment and complementary services, with a view to providing a complete, diverse tourism product in rural areas ...” (Article 18) and includes: country homes, agri-tourism, and rural hotels.

The data was collected through a survey sent by e-mail to 241 rural tourism establishments in the Northern Region that are included in the *Maistorismo* - Hotel Guide Portugal ([www.maistorismo.pt](http://www.maistorismo.pt)) with electronic address. Several surveys did not reach the address and 60 valid questionnaires were obtained from the population. Northern Region includes eight sub-regions, where Douro includes the Alto Douro Wine Region, a living and evolving landscape, recognized by UNESCO as a World Heritage.

Most of the reasons for creating a business included in the questionnaire are accepted in the economic literature (European Commission, 2012; Getz and Carlsen, 2000; Jaafar et al., 2011). This survey consists mostly of closed questions, including personal information of the owner/manager, creation and management of the business, and barriers to entrepreneurship (following European Commission, 2012; Jaafar et al., 2011).

To attain our objectives it was made a factor analysis in order to group similar motivations for starting a business and differentiate them between the several factors, a cluster analysis to identify homogeneous groups of entrepreneurs and through a cross tabulation the different features of each group

## **RESULTS**

### **PROFILE OF THE RESPONDENTS AND FAMILY STORY**

Table 1 summarizes the respondent's demographic profile. The majority of respondents are owners (80%). This sample has 65% of males and most of the respondents are married (75%). 60% are more than 55 years old, although there is a significant number of young owners/managers in the age category of 25-44 years (30%). Despite the fact that almost all of the respondents have Portuguese nationality, 6.7% are foreigners. The present survey shows that most of the respondents have high academic education: bachelor degree (58.3%) or master (10%), and only 31.6% have lower formal educational levels. The main areas of specialization are management/administration and hospitality/tourism (20% and 18.3%, respectively), finances/accounting and agriculture (8.3% each). Professional experience is predominantly in management/administration areas (56.7%), hotel management (18.3%), restaurant management and agriculture (5% each) and others. These professional activities were developed as liberal professionals (28.3%), civil servants (23.3%), entrepreneurs in services or industry (15%), workers in hotels or restaurants (8.3%), banking or agricultural entrepreneur (3.3%), among others.

**Table 1. Demographic Characteristics**

Profile Variables	Categories	Frequency	Profile Variables	Categories	Frequency
Position of the respondent	Owner	80.0%	Area of specialization*	Management/Administration	20.0%
	Manager	15.0%		Finance/Accounting	8.3%
	Assistant manager	1.7%		Hospitality/Tourism	18.3%
	Other	3.3%		Agriculture	8.3%
Gender	Male	65.0%	Other	26.7%	
	Female	35.0%	None	5.0%	
Age	Under 25	0.0%	Working experience*	Management/Administration	56.7%
	25-34	10.0%		Hotel management	18.3%
	35-44	20.0%		Marketing	3.3%
	45-54	10.0%		Restaurant management	5.0%
	55-64	33.3%		Agriculture	5.0%
	65 and more	26.7%		None	8.3%
				Other	15.0%

Marital status	Single	10.0%	Activities before starting the business *	Liberal profession	28.3%
	Married	75.0%		Entrepreneur (trade or industry)	15.0%
	Other	15.0%		Entrepreneur (agriculture)	3.3%
Nationality	Portuguese	93.3%		Worker in a hotel or restaurant	8.3%
	Other	6.7%		Civil servant	23.3%
				Bank employee	3.3%
Level of education	Ph.D	0.0%		Other	16.7%
	Master degree	10.0%			
	Bachelor degree	58.3%			
	Further Education	23.3%			
	Secondary Education	3.3%			
	Primary Education	3.3%			
	Other	1.7%			

Note: <sup>a</sup> Multiple answers permitted

## CHARACTERISTICS OF THE BUSINESS, START-UP, MANAGEMENT AND FAMILY BACKGROUND

At this point we characterize the business, evaluate the main reasons for starting up, analyze the business management and family history.

Table 2 summarizes the characteristics of the business. Most of the businesses in question have already been created for eleven years or more (60%), and 21.7% for more than 20 years. Only 15% have five or less years of existence. The country houses are the main types of tourism accommodation (40%), followed by country homes (35%), agri-tourism (20%) and rural hotels (6.7%). The establishments are located mainly in the *Douro* region (38.3%), followed by *Minho-Lima* (25%), *Cávado* (11.7%), *Tamega* and *Alto Trás-os-Montes* (8.3%, each), *Ave* (6.7%) and *Grande Porto* (1.7%).

Unipersonal enterprise and society by shares are the predominant legal form (46.7% each), but there are 6.7% of anonymous societies. All of them have a micro employer dimension centered in one to two

paid workers (56.7%) although 26.7% have three to five workers. Only 5% have between six to ten paid workers and there is no establishment with more than eleven employees. 60% of the establishments have between five to nine accommodation units, 20% between ten and fifteen and 16.7% less than five.

**Table 2.** Characteristics of the Business

Description		Frequency	Description		Frequency
Type <sup>a</sup>	Country house	40.0%	Number of employees	0	11.7%
	Agri-tourism	20.0%		1-2	56.7%
	Country home	35.0%		3-5	26.7%
	Rural hotel	6.7%		6-10	5.0%
	Other	3.3%		11-20	0.0%
Sub-region	<i>Alto Trás-os-Montes</i>	8.3%	Over 20	0.0%	
	<i>Ave</i>	6.7%	Number of accommodation units	Less than 5	16.7%
	<i>Cávado</i>	11.7%		5-9	60.0%
	<i>Douro</i>	38.3%		10-15	20.0%
	<i>Entre Douro e Vouga</i>	0.0%		More than 15	3.3%
	<i>Grande Porto</i>	1.7%	Years operation	Less than a year	1.7%
	<i>Minho-Lima</i>	25.0%		1-5	13.3%
<i>Tâmega</i>	8.3%	6-10		25.0%	
Legal form	Unipersonal enterprise	46.7%	11-20	38.3%	
	Society by shares	46.7%	More than 20 years	21.7%	
	Anonymous society	6.7%			
	Other	0.0%			

Note: <sup>a</sup> Multiple answers permitted

For most of the respondents (70%) this business was the first entrepreneurial experience, while 18.3% had a past experience and 10% two to five (Table 3). It was found that 73.3% of the respondents created the business and 18.3% inherited it. Only in 25% of the establishments the owner/manager is the only member of the family involved in managing the business, but the percentage of family involvement is significant: 48.3% of them manage the business with the spouse/husband and 25% with other family members. In accordance with the numbers of years in operation of the company, a

significant percentage of owners/managers (71.7%) are managing the business for more than six years.

The access to star-up capital is crucial mainly in rural areas (Banki and Ismail, 2015). In terms of the initial investment funding sources there is a tendency for the use of personal funds (option mentioned by 80% of respondents), followed by public funding (53.3%) and bank loans (43.3%), and, to a lesser extent, loans from family and friends (13.3%). 21% provided all the start-up capital, while 26.7% used this source and government funding support, and 13.3% used their own capital and bank finance.

Despite the fact that 50% of respondents spend more than 30 hours per week to this business, 26.7% spend between 15-30 hours and 23.3% less than fifteen hours, which is consistent with the fact that the majority of the respondents are engaged in another activity as self-employed and 16% in other activities not discriminated. The owners/managers develop other activities, where agriculture has predominance (53.3% of the respondent entities), 16.7% liberal professions, 15% restaurants and 8.3% recreation

**Table 3.** Start-up and Management of the Business

Description			Frequency		
Description		Frequency	Description		Frequency
Number of previous companies	0	70.0%	Hours per week dedicated to the business	Less than 15	23.3%
	1	18.3%		15 to 30	26.7%
	2 to 5	10.0%		More than 30	50.0%
	More than 5	1.7%	Family involvement	Only me	25.0%
How get involved in business	Started myself	73.3%		With spouse/husband	48.3%
	Purchased	0.0%		With others members of the family	25.0%
	Inherited	18.3%		Without family involvement	1.7%
Capital to start the Business <sup>a</sup>	Others	8.3%	Other activities that the management body exercises <sup>a</sup>	Agriculture	53.3%
	Own savings	80.0%		Trade	6.7%
	Loans from family and friends	13.3%	Business restaurant	15.0%	
	Business Angels	0.0%	Recreation	8.3%	
Business partners	0.0%				

	Venture capital	0.0%	Liberal profession	16.7%
	Public funding	53.3%	Other	11.7%
	Bank finance	43.3%	None	8.3%
Years of managing the business	Less than a year	1.7%		
	1 to 2	8.3%		
	3 to 5	18.3%		
	6 to 10	25.0%		
	11 to 20	30.0%		
	More than 20	16.7%		

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Note: \* Multiple answers permitted

Most of the owners/mangers (70%) are second generation entrepreneurs, belonging therefore to a family where at least one parent was entrepreneur (European Commission, 2012). Moreover, 52% of the respondents have had help from family, relatives and/or friends with concrete recommendations and actions to start his first business.

## MOTIVATIONS FOR STARTING THE BUSINESS

### Motivational Factors

Table 4 reports the results for the degree of importance of different objectives for starting up the business. In Northern rural tourism the main motivations (very relevant and relevant) of the respondents to start the business focus on valuing family heritage, the need to maintain the property in the family, improving the financial situation, living in a suitable environment, the business opportunity, meeting interesting people and having success.

#### **Table 4.** Motives for Starting the Business

	Not relevant	Slightly relevant	Relevant	Very relevant	Mean	Standard Deviation
Valuing family heritage	3%	5%	28%	63%	3.52	0.097
To keep the property in the family	5%	8%	42%	45%	3.27	0.106
Improve financial situation	10%	17%	55%	18%	2.82	0.110
To live in the suitable environment	7%	23%	42%	28%	2.92	0.115
Business opportunity	13%	17%	50%	20%	2.77	0.120
To meet interesting people	7%	23%	57%	13%	2.77	0.099
Have success	20%	13%	40%	27%	2.73	0.138
To provide me with a challenge	22%	20%	37%	22%	2.58	0.137
To keep my family together	28%	17%	35%	20%	2.47	0.144
Keeping busy	15%	32%	35%	18%	2.57	0.124
Improve lifestyle	17%	30%	40%	13%	2.50	0.120
Continue the family business	47%	3%	28%	22%	2.25	0.162
Desire for independence	22%	37%	23%	18%	2.38	0.133
To be my own boss	42%	18%	28%	12%	2.10	0.140
To provide a retirement income	33%	37%	22%	8%	2.05	0.107
To gain prestige	38%	32%	17%	13%	2.05	0.135
Previous experience in business	43%	27%	30%	0%	1.87	0.110
Dissatisfaction with work	45%	32%	18%	5%	1.83	0.117
Retirement	48%	30%	20%	2%	1.75	0.108
To make lots of money	43%	40%	15%	2%	1.75	0.100
Being unemployed	83%	12%	5%	0%	1.22	0.068
Fear of losing the job	80%	17%	3%	0%	1.23	0.065

53.3% of the respondents considered that they started this new business to exploit a business opportunity (opportunity-driven entrepreneurs). Only 8.3% are necessity-driven and 38.3% are motivated both for necessity and opportunity.

#### FACTOR ANALYSIS

The relational structure of the motivations to start the business was evaluated by the exploratory factor analysis (EFA) of the correlation matrix, with extraction of factors by the method of the main components followed by a varimax rotation.

The determinant coefficient of the correlation matrix was lower than 0.0001 denoting problems of multicollinearity. Following Marôco (2007), the variable “Fear to lose the job” was removed due to the high correlation with “Being unemployed”.

To assess the validity of the EFA it was used the Keiser-Meyer-Olkin criterion, having observed a value of 0.678, so the factorability correlation matrix is tolerable, and Bartlett’s test of sphericity was significant at 0.000, concluding that the variables are significantly correlated, so the AEF was proceeded. Common factors retained were those who had eigen values greater than one and in accordance with the screen plot.

As reported in Table 5, the factor analysis led to seven factors that explain 72.74% of the variance. To the extracted factors, the percentage of the variance of each variable explained by the common factors extracted is higher than 50% to all the variables.

Given the sample size, significant loadings are those equal or higher than 0.70 (Hair Jr. et al. 1998). Factor 1, which explains 29.09% of variance, includes the motivations “To have success”, “To improve lifestyle”, “Desire for independence”, “Business opportunity” and “To gain prestige”. The second factor (explains 11.79% of variance) is linked with the family and heritage and includes the “Valuing family heritage”, “To keep my family together”, “To keep the property in the family”.

**Table 5.** Principal Component Analysis of Star-up Motives

	Component Factor Loadings							Communalities
	1	2	3	4	5	6	7	
Have success	<b>0.814</b>	-0.113	0.036	0.167	-0.219	0.051	0.004	0.755
Improve lifestyle	<b>0.798</b>	0.056	-0.190	-0.033	-0.182	0.081	-0.096	0.726
Desire for independence	<b>0.777</b>	-0.045	-0.143	-0.166	-0.189	0.234	-0.087	0.751
Business opportunity	<b>0.729</b>	-0.182	0.116	-0.025	0.004	-0.162	-0.330	0.713
To gain prestige	<b>0.702</b>	-0.265	0.071	0.517	-0.040	-0.036	0.003	0.838
To improve financial situation	0.671	0.197	-0.383	-0.035	-0.009	0.270	-0.328	0.818

## Conceição Castro

To meet interesting people	0.645	-0.133	0.523	-0.113	-0.012	-0.194	-0.005	0.758
To live in the suitable environment	0.597	0.270	0.301	-0.407	0.250	0.018	-0.263	0.817
To make lots of money	0.589	0.192	-0.310	0.008	-0.269	-0.228	0.207	0.647
To provide a retirement income	0.560	0.261	-0.186	-0.024	-0.272	0.021	0.275	0.567
Previous experience in business	0.519	-0.378	-0.001	0.427	0.223	-0.138	0.059	0.667
To be my own boss	0.497	0.250	-0.264	-0.496	0.035	-0.351	0.044	0.752
To provide me with a challenge	0.460	-0.029	0.446	0.308	-0.070	-0.196	0.138	0.568
Valuing family heritage	-0.169	<b>0.751</b>	0.111	0.181	-0.037	0.172	-0.199	0.708
To keep my family together	0.161	<b>0.709</b>	0.206	-0.102	0.015	-0.312	0.353	0.804
To keep the property in the family	-0.023	<b>0.709</b>	0.237	0.318	-0.132	0.088	0.132	0.703
Continue the family business	0.117	0.493	-0.247	0.360	0.480	0.013	-0.243	0.738
Keeping busy	0.252	0.031	0.694	-0.216	0.187	0.213	-0.100	0.683
Being unemployed	0.311	0.106	-0.248	0.121	0.634	-0.341	0.027	0.704
Retirement	0.466	0.101	0.014	0.048	0.214	0.661	0.351	0.835
Dissatisfaction with work	0.352	-0.279	-0.092	-0.247	0.446	0.204	0.459	0.722
Percent of variance explained (%)	29.09	11.79	8.14	6.79	6.26	5.77	4.91	
Cumulative percentage (%)	29.09	40.87	49.01	55.80	62.07	67.83	72.74	

### Cluster Analysis

A cluster analysis was made in order to identify the profile of Northern entrepreneurs in rural tourism based on the eight significant loading factors. The cluster analysis was conducted applying a hierarchical technique using the Nearest Neighbour method with squared Euclidean distances. The number of clusters was determined by the analysis of the dendrogram and by the distances between the clusters. K-means method was applied in order to refine the number

of clusters. The results showed a three cluster solution. Table 6 reports the mean score of each motive for starting the business.

**Table 6. Cluster Analysis of Motives for Start the Business**

	Cluster 1	Cluster 2	Cluster 3	F Test
Valuing family heritage	<b>3.74</b>	2.79	<b>3.74</b>	11.97
To keep the property in the family	<b>3.35</b>	2.50	<b>3.65</b>	12.04
To keep my family together	<b>2.61</b>	1.29	3.04	17.39
To have success	1.74	<b>3.07</b>	<b>3.52</b>	37.83
Business opportunity	2.09	<b>3.07</b>	3.26	15.07
Improve lifestyle	1.83	2.43	3.22	22.24
Desire for independence	1.48	2.79	3.04	28.57
To gain prestige	1.30	2.29	2.65	14.54

In Cluster 1, denominated “family and legacy protectors”, the main motives for creating the business are related to the family and its heritage: valuing the family heritage, keep the property in the family and keep the family together. In cluster 2 – “success and opportunity seekers” – the main motivations are related to success and business opportunity, and the third cluster – “legacy protectors and success seekers” – combines motivations related to the property of the family and professional success. Most of the mean scores are higher in cluster 3 than in the others.

In order to validate the cluster analysis with the three groups of entrepreneurs, with different characteristics in relation to the motivations to start the business, it was conducted a discriminant analysis. The test of equality of group means shows that for all the variables considered there is at least one group where the means are different (Table 7).

**Table 7. Test of Equality of Group Means**

	Lambda de Wilks	Z	df1	df2	Sig.
To keep my family together	0.62	17.393	2	57	0.00
To keep the property in the family	0.70	12.037	2	57	0.00
Valuing family heritage	0.70	11.972	2	57	0.00
Business opportunity	0.65	15.065	2	57	0.00
To gain prestige	0.66	14.538	2	57	0.00
To have success	0.43	37.831	2	57	0.00
Improve lifestyle	0.56	22.24	2	57	0.00
Desire for independence	0.50	28.57	2	57	0.00

Function 1, with an eigenvalue of 2.22, explains 61.6% of the variance in terms of differences between groups and function 2 explains 38.4% (Table 8). The p-value is 0.00 which shows that the discriminant power of the two functions is statistically significant. 98.3% of original grouped cases were correctly classified.

**Table 8.** Discriminant Analysis for the Three Groups

Discriminant function	Eigenvalue	Percentage of variance	Canonical correlation	Wilks' Lambda	Chi-square	Sig.
1	2.22	61.6	0.83	0.13	109.058	0.00
2	1.38	38.4	0.76	0.42	46.458	0.00

Cluster 1 – “family and legacy protectors” – is integrated mainly by males (69.6%), Portuguese (95.7%), and is the largest group over 55 years old and with the highest rate of superior education (78.3%), mainly a bachelor degree. Although few have education specialization in management, their professional experience is mainly in this area. This cluster concentrate owners/managers of personal

enterprises (60.9%), located in Douro (56.5%), mostly country homes (56.5%) and country houses (34.8%) and with one or two workers. For the majority this was the first enterprise (65.2%) and 69.9% started it, although this is the group where the percentage of inherited businesses is higher (21.7%). For starting the business they were primarily financed by their own savings and public financing (52.2%)

Cluster 2, “success and opportunity seekers”, is the group with an equal percentage of men and women and with the highest rate of foreigners (14.3%). The highest age groups are between 55-64 years old (42.9%) and 35-44 (21.4%). 57.1% have superior education, and the principal areas are in management and agriculture. They also have professional experience in management and hospitality/tourism. In this group a significant number manages the business alone (35.7%), the highest among the three clusters, or with the wife/husband, and have the highest number of employees and accommodation units. Most of the enterprises are society by shares, and they dedicate more time to this business than the other groups. The types of accommodations are country houses (50%) and agri-tourism (28.6%) and 57.1% of them also develop agriculture activities. The start capital essentially combines public resources, bank loans and own savings and is the group where most owner/managers are driven-opportunity (71.4%).

Cluster 3, “legacy protectors and success seekers”, is equal to cluster 1 in terms of gender and nationality. 47.8% are between 25-44 years old and is the group with the highest rate of master degree. Predominate the country homes (39.1%), country houses (30.4%) and agri-tourism (17.4%). Besides agriculture, 21.7% also have restaurants. It is the group that reported the highest percentage that they started the business both for necessity and opportunity (56.5%).

## **RISKS, BARRIERS TO ENTREPRENEURSHIP AND PLANS FOR THE FUTURE**

When asked about the greatest fears of starting a business today, following European Commission (2012), 73.3% of the owners/managers indicate that the uncertainty of not having a regular income could prevent them from starting a business (Table 9).

**Table 9. Greatest Fears when Starting a Business**

Description <sup>a</sup>	Frequency
The possibility of going bankrupt	28.33%
The uncertainty of not having a regular income	73.33%
The risk of losing the property	26.67%
Job insecurity	10.00%
The possibility of suffering a personal failure	11.67%
The need to devote too much energy or time to it	26.67%
Other	3.33%

Note: <sup>a</sup> Multiple answers permitted

At the level of business management (Table 10), 58% strongly disagree or disagree that they lack knowledge on how to obtain funding, 45% disagree completely or disagree that they lack managerial skills and tourism knowledge, tourism market trends and opportunities and 42% agree or strongly agree that they lack expertise in marketing and communication.

**Table 10. Perceived Barriers to Running a Business**

	Strongly Disagree	Disagree	Neither Agree nor Disagree	Agree	Strongly Agree	Mean	SD
Lack of management skills and knowledge in tourism	16,7%	28,3%	26,7%	26,7%	1,7%	2,68	1,097
Lack knowledge in tourism market trends and opportunities	6,7%	38,3%	18,3%	28,3%	8,3%	2,93	1,133
Lack of knowledge on how to apply for funding from financial institutions	16,7%	41,7%	20,0%	21,7%	0,0%	2,47	1,016
Lack of tourism marketing skills	6,7%	31,7%	20,0%	33,3%	8,3%	3,05	1,126

Note: SD – Standard Deviation

They also encountered some restrictions (Table 11), the most being the bureaucracy, lack of financial support and lack of information (based on European Commission, 2012).

**Table 11. Perceived Barriers to Entrepreneurship**

	Strongly Disagree	Disagree	Neither Agree nor Disagree	Agree	Strongly Agree	Mean	SD
Lack of available financial support from the government to small businesses	1.7%	10.0%	20.0%	46.7%	21.7%	3.77	0.963
The complexity of administrative procedures	1.7%	5.0%	11.7%	48.3%	33.3%	4.07	0.899
The difficulty to obtain enough information how to start a business	0.0%	16.7%	16.7%	43.3%	23.3%	3.73	1.006
One should not have started a business if there is a risk it might fail	0.0%	3.3%	26.7%	56.7%	13.3%	3.80	2.980
People who have started their own business and have failed should be given a second chance	0.0%	3.3%	26.7%	56.7%	13.3%	3.80	0.708

Note: SD – Standard Deviation

Using non-parametric tests it was investigated whether there were differences in the opinions about the problems encountered to start the business according to the socio-demographic characteristics of the owners/managers (age, gender, level of education, area of specialization, professional specialization, family background) and factors related to the way they started the business (sources capital, help from family and friends, previous business experience, the way they were involved in the business, necessity versus opportunity motivations).

On what concerns the opinion about the lack of available financial support from the government to small businesses there are differences between different owners/managers with different ages ( $p$ -value of Kruskal-Wallis (KW) test=0.01), but not among the other features analyzed. The opinion about if it is difficult to start one's own business due to the complexities of the administrative process is different according to age ( $p$ -value of the KW test=0.039), and the

help they had to start by family, relatives or friends with concrete recommendations and actions ( $p$ -value of KW test=0.008).

The difficulty in obtain sufficient information how to start a business differs according to gender ( $p$ -value of the Mann-Whitney test=0.016), and the way they were involved in the business – purchased, inherited or started - ( $p$ -vaule of the KW=0.034). The sources of start-up capital used also differentiate what they think about the second chance that should give to people who started their own business and failed ( $p$ -value of the KW=0.027). For the other characteristics there isn't statistical evidence that the opinion about the problems found is different among entrepreneurs.

In the future, almost all the respondents (96.7%) want to keep the business and only 3.3% forecast ending it (Table 12). 45% have intention to expand the business, and 33.3% have not yet decided. For the next two years, 55% plan to invest, especially in the areas of rehabilitation and increased supply, promotion and marketing, rational use of energy and, to a lesser extent, tourist animation and staff training.

**Table 12.** Plans for the Future

Description	Criteria	Frequency
Intention to keep the business	Yes	96.70%
	No	3.30%
Intention to enlarge the business	Yes	45%
	No	21.70%
	Perhaps	33.30%
Intention to invest in the next two years	Yes	55%
	No	16.70%
	Perhaps	28.30%
Investment intentions, according to the nature of the investment <sup>a</sup>	Promotion, marketing	41.67%
	Increase in supply	43.33%
	Tourist animation	23.33%
	Requalification of supply	53.33%
	Staff training	15.00%
	Rationalization in the use of energy	40.00%

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Note: <sup>a</sup> Multiple answers permitted

## **DISCUSSION**

This article, based on a survey, provides a characterization of rural tourism entrepreneurs in the North of Portugal, the main motivations for starting the business and barriers to entrepreneurship.

The sample consists mostly of male and married owners, with Portuguese nationality and with more than 55 years old. This is similar with the study of Pato (2016) for rural tourism in Douro, and Gomes and Renda (2016) for the Centro Region of Portugal, although here the businesses are mostly owned by women as in Jaafar, Rasoolimanesh, and Lonik (2015).

The majority of owners/managers who run the business have higher education. This findings are in accordance with Gomes and Renda (2016), Getz and Petersen (2005) and Pato (2016) but in contrast with Jaafar et al. (2011, 2015). Rural tourism is an activity with owners coming from medium and medium/high social classes (Getz and Carlsen, 2000; Gomes and Renda, 2016; Pato, 2016), suggested by the level of education and the percentage of entrepreneurs that inherited the business. Although the high educational level, the academic and professional experience is mainly in management/administration rather than tourism/hospitality. This is not surprising since high education in tourism/hospitality is recent in Portugal.

They are predominantly second generation entrepreneurs. Several studies have analyzed the impact of family entrepreneurial background on business success (Cooper and Gimeno-Gascon, 1992; Duchesneau and Gartner, 1990; European Commission, 2010) and although it is not consensual, these last studies conclude that it is more likely to succeed when there is a family history, while Lerner (2001) shows that, in small businesses in the tourism sector, the experience

of the family contributes significantly to the variance of income, but not for profit.

Despite the importance of tourism for rural areas, the level of employment generated (apart from self-employment) is not very high: 57% have only one to two paid workers. It is noteworthy that the majority of respondents exercise other professional activity as employee, not devoting full time to this business. Besides tourism, more than 50% also develop agriculture activities. Pato (2016) points out as one of the weaknesses of rural tourism the small percentage dedicated to the business, which justifies the weak development of tourist animation activities and the weak rooting at the local level. However, in the North of Portugal, the hours dedicated to the business is high, and tourist animation is one of the investment that entrepreneurs plan to do.

The respondents are mainly opportunity-driven entrepreneurs and, according to European Commission (2012) the opportunity motivated enterprises have a higher economic contribution than necessity driven. It appears therefore that entry is mainly due to positive motivations (pull factors), much more than necessity of going out or avoid an unwanted situation. The relational structure of motivations, through the exploratory analysis, highlights the desire for success, improving lifestyle, independence, business opportunity and prestige (factor1) as Getz and Petersen (2005). As Chen and Elston (2013), Jaafar et al. (2011), Getz and Carlsen (2000), Neves (2008), and Pato (2016) the family heritage is an important motivation to start the business, and keep the family together (factor 2).

The cluster analysis led to three different groups according to their motivations: those who want to protect the family and heritage, those who seek success and new opportunities and a final group that combines family and heritage goals with the desire for success. Most of the previous studies on rural tourism entrepreneurship do not develop a cluster analysis based on motivations. The segments

defined in this research are closer to the study of Getz and Peterson (2005) than Chen and Elston (2013).

The owners/managers encounter some barriers to start the venture as bureaucracy, lack of financial support and lack of information. However these difficulties are felt differently according to some characteristics of the entrepreneurs. The opinions about the lack of available financial support and the complexity of the administrative procedures are different according to age groups and the lack of information between gender and the way they were involved in the business. Compared to the overall results for Portugal, rural tourism entrepreneurs in the North of Portugal found more difficulties due to the complexity of administrative procedures (European Commission, 2012).

## **CONCLUSIONS**

The Northern Region has a broad and diverse set of resources with high tourist interest. It offers qualified accommodation, namely at the level of rural tourism. This is the region with the greatest supply of rural tourism in Portugal. Rural tourism is one of the viable options for rural development and entrepreneurs have an important role in this process. In the North of Portugal the results of the research suggest that entrepreneurial activities are undertaken mainly by individuals of a mature age but there is already an interesting group of young people, and with high education. They have prior work experience mostly in management, but few had previous experience in start-up businesses. Most rural tourism ventures were created by the respondents, but 18% of the respondents inherited it. Although the majority started the business by opportunity there is a high share that started both by opportunity and necessity. The analysis of motivations to undertake rural tourism activities suggest heterogeneity of factors that influence the entrepreneurial decision. Factor analysis revealed that the most important motivations were related to success, lifestyle,

independence, business opportunity and prestige, followed by valuing family heritage, keep the family together and the property in the family. In fact, one of the valences of rural tourism is the recovery of properties (palatial, manor and rustic houses), some of them with centuries of existence.

It was possible to group entrepreneurs in three different segments labeled “family and legacy protectors”, “success and opportunity seekers” and “legacy protectors and success seekers” according to their motivations.

Rural tourism present several challenges. Promoting rural tourism entrepreneurial activities requires eliminating barriers as the level of bureaucracy, lack of financial support and information felt by these entrepreneurs. Tourism activity is crucial for the promotion of sustained and integrated local development of rural regions, which involves the articulation between different entrepreneurs and between them and local agents. The development of rural tourism should be considered in the broader context of the tourism system to make “Portugal the most agile and dynamic tourist destination within Europe” as defined by the Portuguese government.

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## E-BUSINESS ADOPTION IN SMALL AND MEDIUM SIZED TOURISM FIRMS IN IRAN: CHALLENGES AND PROSPECTS

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*Information technologies play a vital part in managing a tourism firm efficiently. As SMEs form the major share of tourism industry, they are increasingly adopting e-business to benefit from its numerous advantages. However, to adopt e-business, SMEs may encounter a plenty of challenges and find it not a trouble-free path. In Iran, by growing the number of internet users, more and more tourism SMEs are adopting e-business, to enhance their competitive advantage in the market. The paper is aimed to explore the challenges and prospects of e-business adoption by travel and tourism SMEs in Iran, and role of government in facilitating the process. To serve the purpose, mixed method is adopted to identify these barriers and benefits. The results of an in-depth interview with e-tourism experts and tourism SMEs' managers, and a questionnaire containing close-ended questions showed that macro-level challenges are of the major importance, and the benefits fell into to marketing strategies and e-CRM categories.*

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**Keywords:** *e-business, SMEs, e-tourism*

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## INRODUCTION

In recent years deployment of information technologies (IT), and especially e-business has transformed the way tourism firms are managed. By growing the need for improving customer satisfaction, and facilitating the interaction between suppliers and consumers around the world, more tourism business are adopting the information technologies in their management process (Law, Buhalis & Cobanoglu, 2014; Condratov, 2013). Adopting e-business offers numerous advantages to small and medium tourism enterprises (SMTEs), such as reduction of operational costs; improving customer services; accessing new market shares and new customers (Apulu, 2011). According to the Organization for Economic Co-operation and Development (OECD), e-commerce has a very positive effect on developing countries' economy, and provides opportunities for them to improve the efficiency of tourism industry, as a main success factor to sustain their economies (National Tourism Strategy, 2010). However, SMTEs encounter many challenges in adopting new information technologies. Inadequate telecommunication infrastructure (Murelli & Okot-Uma 2002; Salman 2004; Hawk 2004; Jennex & Amoroso 2002; Karanasios 2008), poor payment systems (Hawk 2004; Payne 2002; Murelli & Okot-Uma 2002; Aljifri, Pons & Collins 2003; UNCTAD, 2004; Ranganathan & Kannabiran 2004) in macro level, and lack of financial resources (Lake 2000; Cloete, Courtney & Fintz 2002; Indjikian & Siegel 2005; Karanasios 2008), lack of skilled and knowledgeable employees (Lopez-Bassols & Vickery 2001; Moodley & Morris 2004; Jennex & Amoroso 2002; Karanasios 2008) in micro level are among the most important challenges of adopting new IT applications by SMTEs.

In Iran, the number of internet users has reached 56,700,000 by 2016 (Internet World Stats, 2017), and according to the latest report of Statistical Center of Iran (2015), internet penetration rate has had

a 35% growth compared to the 2013 report. According to the articles of Iran's Socioeconomic and Cultural Development five-year Plan (especially the 5<sup>th</sup> and 6<sup>th</sup> Plan) the development of e-business application is vital to realize e-government services until the end of the 6<sup>th</sup> plan (Sixth Iran's Socioeconomic and Cultural Development Plan, 2015). Despite this Plan and the growth in internet usage in Iran, many challenges in macro level such as unreliable IT infrastructure and lack of standard payment systems are not solved yet. Apparently, these challenges negatively effect on adopting e-business by travel and tourism firms in Iran, and decrease their efficiency especially to find and cultivate overseas customers. On the other hand, these supportive policies encourage SMEs to adopt e-business and maximize their competitive advantage. In addition, sectors (especially tourism), are increasingly globalized, dominated by larger firms and their performance and structure of value chain create an opportunity to small and medium enterprises (Mohammad and Ismail, 2013).

This study aims to explore the present status of SME travel and tourism firms in e-business environment especially their challenges and prospects in macro and micro level.

## **E- BUSINESS AND TOURISM**

e-business is defined as external communications, through internet which link travel services suppliers to costumers and includes e-marketing, e-commerce and e-logistic, and on the other side it supports internal communications through intranet and enables the organization to use the common systems integrally (WTO, 2001; Vladimirov, 2015). In fact e-commerce is a part of e-business and refers to all types of electronic transactions between organizations and stakeholders, whether they are financial transactions or exchanges of information or other services (Chaffey, 2015, p. 17).

As a highly information-intensive industry, tourism is highly influenced by IT applications. The rapid development in IT in general, and internet in particular, has transformed tourism industry (ho & Li, 2007). Internet is a valuable tool for suppliers and consumers to access information, easier communication and online purchase. Moreover, it is recognized as an effective marketing tool for tourism businesses (Buhalis & Law, 2008). According to Allied Market Research report (2016) the online travel market is estimated to reach 1,091 billion by 2022. Direct travel suppliers accounted for approximately 57% of the overall online travel market revenue in 2015. On the other side, online travel agencies (OTAs) are expanding their offerings rapidly to attract travelers and increase their customer base.

Small and medium-sized enterprises (SMEs) are the most common type of firms in tourism sector (Buhalis, 1998; Liu, 2000; Gammack, Molinar, Chanpayom, 2004). Particularly, these firms are the main part of tourism body in developing countries and are recognized as the backbone of tourism destinations (Purcell, Toland & Huff 2004; Gartner 2013; Gammack, 2004). Adoption of new technologies especially internet offers new opportunities to SMTEs to access new markets and customers (OECD, 2000) and conduct their business in a cost effective way (WTO, 2001). Moreover, adopting e-business by SMTEs will increase productivity, increase efficiency of internal process, and facilitate to enter global markets (Chyau, 2005). Abou-Shouk, Mejicks and Lim (2015) divided the benefits of e-business in three factors: essential (a strategic future-oriented perspective), marketing and competition (travel businesses' ability to compete effectively and gain advantage in the market place through meeting the needs of customers), and internal business efficiency (infrastructure influences that support the delivery of an effective strategy).

However, the SMTEs are facing serious impediments for adopting new information technology, in particular, e-business (Kim, 2004). These barriers are in both macro and micro levels (Karanasios, 2008). Barriers in macro level include insufficient IT infrastructure, and small e-commerce market size, lack of confidence among customers for online shopping, and in micro level it includes limited knowledge about IT among employees, and lack of financial resources and resistance to adoption of e-commerce (Kim, 2004). Governmental organizations and policy makers are the key players to remove macro-level barriers. Chyau (2005) declared that the best measure by governments is to create an enabling environment. Simplifying the legal processes, developing educational programs, and providing financial supports for SMEs (Chyau, 2005), moving government procurement on line, and finally facilitating e-transformation in industry sectors (Kim, 2004), are among the policies which encourage the growth of SMEs.

## **E-BUSINESS AND TOURISM IN IRAN**

Iran is the second country (after Bahrain) in Middle East in terms of number of the percent of internet users (Internet World Stats, 2017). In June 2017, this number reached 68.5% of the population in comparison to 3.8% in December 2000. Statistics show that Internet penetration rate in Iran has been 30% in 2013, 45.3% in 2015 (Statistical Center of Iran, 2015), and has grown about 70% in 2017 (Internet World Stats, 2017). Despite this growth, internet infrastructure is growing slowly compared to the countries with lower rate of internet penetration. In terms of Average Connection Speed (Table 1) and Average Peak Connection Speed (Table 2), Iran ranked 111 and 123 respectively, among 146 qualified countries in 2016 (Akamai State of Internet Report, 2016).

Table 1: Iran's Average Connection Speed (IPv4) Ranking among 146 Qualified Countries

Global Rank	Country/ Region	Q1 2016 Avg. Mbps	YoY Change
28	Israel	13.5	16%
49	United Arab Emirates	8.8	40%
53	Qatar	8.4	21%
63	Kenya	7.3	298%
64	Turkey	7.2	12%
72	Kuwait	6.6	27%
73	South Africa	6.5	96%
91	Saudi Arabia	4.7	23%
101	Morocco	4.3	47%
111	Iran	3.5	88%
116	Nigeria	3.3	14%
130	Egypt	2.4	44%
133	Namibia	2.3	4.8%

Table 2: Iran's Average Peak Connection Speed (IPv4) Ranking among 146 Qualified Countries

Global Rank	Country/ Region	Q1 2016 Avg. Mbps	YoY Change
5	Qatar	89.2	27%
23	Israel	65.8	-3.4%
31	United Arab Emirates	60.6	42%
53	Kuwait	47.8	-46%
64	Turkey	40.7	5.7%
79	Saudi Arabia	33.4	31%
87	South Africa	30.1	82%
106	Kenya	24.2	234%
110	Nigeria	23.3	1.0%
111	Morocco	22.8	40%
123	Iran	17.8	44%
129	Egypt	16.0	36%

134	Namibia	13.3	15%
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Launching an online business in Iran, and taking the full advantage of information technologies in the business environment, is not a very straight forward path. According to the digital economy rankings (2010) which assess the quality of a country's ICT infrastructure and the ability of its consumers, businesses and governments to use ICT to their benefit, Iran ranked 69<sup>th</sup> among 70 countries (Economist, 2010). In another report released by Iran Information Technology Organization in 2012 (Table 3), Iran's current position in terms of IT infrastructures has been assessed. In the index of "condition of developing a business", Iran is in a "poor" position compared to Denmark, Turkey and Egypt (Iran Information Technology Organization, 2012).

**Table 3: Iran's Position in IT Infrastructure Compared to Four Countries**

Criterion	Iran	South Korea	Denmark	Turkey	Egypt
Supply and Demand Condition	Very Poor	Good	Middle to High	Middle to Low	Poor
Developing a Business in the Market	Poor	Poor	Excellent	Middle to Low	
Technology	Very Poor	Excellent	Excellent	Middle to High	Poor
Government Performance, Policies and Programs	Poor	Good	Excellent	Middle to Low	Very Poor
e-business Efficiency in Society	Very Poor	Excellent	Excellent	Middle to Low	Poor
Total	Very Poor	Good	Excellent	Middle to Low	Poor

In the context of tourism, there is few researches about the conditions of tourism online businesses. Findings of Travel and Tourism Competitive Report 2015 shows no progress in two sub-indexes of "ICT use for B-to-B transactions" and "ICT use for B-to-C transactions" compared to the 2013 report. Moreover, the total ranking of Iran has reached 98<sup>th</sup> from 93<sup>rd</sup> in the previous report. The last report shows the rank of 94<sup>th</sup> for ICT readiness (Travel and Tourism Competitive Report 2017) with 4 steps progress. Table 4 provided a comparison of Iran's ICT infrastructure sub-indexes in the 2013, 2015 and 2017 Travel and Tourism Competitive Report.

Table 4: Comparison of Iran's ICT infrastructure Rankings in the 2013 and 2015 Travel and Tourism Competitive Report

ICT Index	Iran's Ranking in 2013 Report	Iran's Ranking in 2015 Report	Iran's Ranking in 2017 Report
Total rank of ICT Infrastructure/ ICT Readiness	93	98	94
ICT use in B2B transactions	131	131	116
ICT use in B2C transactions	115	115	106
Individuals using internet	96	93	86
Broadband internet subs. per 100 pop.	90	78	68
Mobile telephone subs. per 100 pop.	111	110	103
Mobile broadband subs. per 100 pop.	128	123	109

Mobile network coverage (% pop.)	n/a	94	112
Quality of electricity supply	n/a	61	62

## METHODOLOGY

The mixed method (Qualitative and quantitative) is adopted to identify the challenges and the prospects of e-business adoption by travel and tourism firms in Iran. The mixing of the two types of data might occur at several stages: the data collection, the data analysis, interpretation, or at all three phases (Creswell, 2013). To do this, a questionnaire including close-ended questions (five points Likert scale) (quantitative approach), and semi-structured in-depth interviews (qualitative approach) were done with Iranian e-tourism experts and academics and the managers of travel and tourism firms located in four main cities of Iran, to assess the barriers and benefits of e-business adoption by these firms. Each close-ended question has a value of 5 if it is strongly agreed with and the value of 1 if it is strongly disagreed with by managers of the firms and e-tourism experts.

Data collection method for selecting the managers is deliberate sampling: "*this sampling method involves purposive or deliberate selection of particular units of the universe for constituting a sample which represents the universe*" (Kothari, 2013). To select the travel firms involved in e-commerce context, the key words of "online booking of travel services", "online booking of hotel", "online booking of flight" in Persian (Farsi) language searched individually

and in combination, from September to the end of January 2016 . After observing the travel websites appeared in the search results, 61 firms that provided these services online were selected. Finally 35 firms located in four cities of Tehran, Isfahan, Shiraz and Mashhad participated in this study.

To access the e-tourism experts in this study, the snowball sampling method was utilized. Snowball sampling is a purposive sampling technique that is used when members of the population are not easily accessed. Therefore the researcher identifies a number of them and they recruit the other subjects (Latham, 2008). In this study, every e-tourism expert has introduced another one, and finally 36 individual contributed to this study.

In this study two primary research questions, and one secondary question have been investigated:

Q1: what are the challenges of travel and tourism firms in the context of e-business

Q2: what are the prospects of these firms in the context of e-business?

Q3: what is the role of government in facilitating e-business adoption by travel firms?

## **DISCUSSION AND FINDINGS**

### **Challenges**

To answer the first question (challenges), 16 close-ended questions containing micro and macro level challenges were asked from two groups of participants. The answers provide by the experts shows that "lack of standard payment system" in Iran is the prime challenge for tourism firms. "Cost of Internet" and "lack of government support from tourism firms" are of the least importance among macro-level challenges. In the micro-level they believed that

"lack of knowledge among the employees to solve technical problems" is the most challengeable one.

However, the managers perceived the "lack of skillful work force in the market", the most important challenge in the micro-level, and similarly, the most important one refers to "lack of standard payment system" in Iran. Table 5 and 6 provided the answers to the open-ended questions about the challenges faced by tourism firms in adoption of e-business. The e-tourism experts mainly mentioned the challenges categorized in political dimension. On the contrary, the managers' answers cover the legal dimensions.

Table 5. Additional challenges of small and medium sized tourism firms in e-business adoption (e-tourism experts' perspective)

Micro level/ macro level	dimension	The answers provided by experts in the interviews
Macro-level	political	International sanctions and limitations imposed on overseas transactions in Iran
		Instability in political conditions, and changing macro-level policies periodically
		Lack of supporting policies and regulations to foster private section
		Lack of awareness among policymakers about tourism trends in the country
	Legal	The lack of an official union dedicated to the electronic tourism businesses

	Technological	Low speed of Internet
	Social	A Failure to regular update of official tourism portals of the country
		the absence of familiarity with online shopping among the customers of tourism services
		Cultural constraints resulted from fear of change in the society (the majority of customers with the buying power of travel services are among middle aged and up)
Technical	Lack of employees expertized in both fields of tourism and e-commerce	
Micro-level		Mismatches between the purchased product/ service and the promised product/ service
		Lack of internet usage in all levels of the organization inclusively

Table 6. Additional challenges of small and medium sized tourism firms in e-business adoption (managers' perspective)

Micro level/ macro level	dimension	The answers provided by managers in the interviews
Macro level	Political	International sanctions and limited relations with developed countries
		Lack of awareness among policymakers about tourism trends in the country
	Legal	The absence of exclusive regulations for electronic tourism businesses

		Interfering governmental regulations
		Lack of monitoring regulations for delinquent companies
		Lack of codified laws for imposing a fine on cases such as flight delays
		Secret lobbies between state-owned airlines and several specific companies
		Centralizing the services and selling government services to the specific companies in the capital
		Lack of government support of startups or low-budget companies
		Lack of contribution among the authorities to comply the obligation to perform all the processes online (for example, to cancel their ticket, customers need to hand it personally with the related authorities. The process is not performed online)
	Technological	Low speed of Internet
		Frequent internet network interruptions
	Social	lack of trust among customers in electronic businesses due to cybercrimes

## Prospects

To investigate the second research question, 19 variables were asked the interviewees. The findings showed that the variables "access to the new customers" and "adoption of optimal marketing methods" were the most motivating factors for adoption of e-business in small and medium sized tourism firms in e-tourism experts' perspective. While the less important factor in their opinion was "easy interaction with other businesses". However, on the other side, research statistics revealed that "easy and low-cost communication" and "time saving" are most important factors respectively, for the

mangers to adopt e-business, and the less encouraging factor for them was "easy interaction with other businesses". Both group of interviewees added more factors which are listed in table 7 and 8.

Table 7. Other benefits of e-business adoption from experts' perspective

Category	Additional benefits from experts' perspective
Marketing	Presenting the business in an international platform
	Using the potentials of social media for B2B and B2C marketing
Customer Relationship Management	Easy communication with the customers in pre, post trip and in-trip services
	Time saving maximizes customer satisfaction

Table 8. Other benefits of e-business adoption from managers' perspective

Category	Additional benefits from managers' perspective
Marketing and Identification of target customers	Accelerating the introduction of product/service to the market
	Accelerating the process of taste identification
Customer Relationship Management	Service/ product diversification
	Promoting competition in the market to provide the best services to customers
Economic	Reducing human resource costs

## Role Of Government

The role of government in facilitating e-business adoption by small and medium sized tourism firms was examined through an open-ended question. Both groups provided answers to the question

which are listed in tables 9 and 10. Answers are divided into 5 categories.

**Table 9. Role of government in facilitating e-business adoption by small and medium sized tourism firms (experts' perspective)**

Dimension	e-tourism experts' perspective
Political	Reducing political tensions
	Facilitating international relationship
	Changing the attitude of macro-level authorities about online business
Economic	Providing low interest rate funds for SMEs
	Providing tax deductions
Technological	Reducing the limitations such as low speed of Internet
	Promoting free information flow in cyberspace
Legal	Adoption of credible macro policies and monitoring the implementation of these policies
	Monitoring the market to assure fair competition
	Reducing bureaucracy
	Legislation of specific and clear-cut laws for tourism electronic businesses
	Organizing the issuance license for online businesses
	Eliminating exclusive rights and equal distributing of government tourism services among e-businesses
	Strengthening the private sector
Social	Promoting online shopping culture in the society

**Table 10. Role of government in facilitating e-business adoption by small and medium sized tourism firms (managers' perspective)**

Dimension	Managers' perspective
Political	Changing attitude toward foreign tourists
	Removing barriers to supply the basic infrastructures such as the barriers in the Airline industry

Economic	Reducing the cost of internet
Technological	Improving internet infrastructures, for example increasing internet bandwidth
	Securing payment gateways
Legal	Reducing bureaucracy, and Legislation of specific and clear-cut laws for tourism electronic businesses
	Issuing license only for qualified online travel business
Social	Promoting online shopping culture in the society

## CONCLUSION

The findings show that challenges in macro-level are more significant than in micro-level. Responses provided by the both groups about macro-level challenges are classified into political, Technological, legal and social dimensions. Obviously two dimensions of "environmental" and "economical" in macro-level received less attention by the experts and managers. Although, the "Lack of standard payment system" is a technological issue, it is overlapped with political dimension, since the international sanctions imposed on Iran's banking system is related to the political decisions made in macro-level. In social perspective, disinclination toward online shopping, especially among middle aged citizens who are the major customers of tourism services, has caused online businesses not to be flourished. Comparing the perspective of the both group, e-tourism experts and academics emphasized more on political dimension, while the managers of SMEs mentioned the legal dimension as the most important. This implies on a difference of opinion between those who are theoretically expert and those who are practically active in this field. Secret lobbies between state-owned airlines and several specific companies which held public-privately to receive exclusive services, and interfering governmental policies, and centralization of travel services in Tehran (the capital city) are chief among the challenges in the macro environment. Lack of developed infrastructure which leads to the problems like frequent

interruption in internet network and low speed of internet has caused the businesses not to able provide the best services for their customers. Overall conclusion of the challenges opposes to the findings of a research which claimed the most important challenges in this context are internet availability, digital gap, lack of education in e-tourism field, and lack of electronic infrastructure (Bavarsad and Safari, 2014).

The benefits of e-business adoption by travel SMEs in Iran, it can be perceived that the new canal for marketing and introducing the services more widely in the market is the most encouraging benefit for the tourism businesses. Easy access to new customers, meeting their constant changing needs, and last but not the least, saving time, push more travel SMEs to adoption of e-business.

The most significant role of government in facilitating e-business adoption, falls into legal dimension. Since the most part of decision making process occur in the body of government and public sector, instead the private one, success and failure of businesses remains in the hand of central government, and greatly depends on government's decisions and executing the approved ones. According to the research findings role of government must to be shifted to monitoring, and private sector should gain the power to be involved in decision making process. Lack of practical will in executing Sixth Iran's Socioeconomic and Cultural Development Plan about involvement of private sector, and e-government development is obvious. Financial supports by the government is not a major problem for tourism SMEs, instead the legislation of specific and clear-cut laws for tourism electronic businesses and providing facilities like legal and secure payment system can be more effective. This is corresponded to the research of Rajabi (2011) noted financial supports has no effect on e-business adoption by SMEs.

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## OBLIQUITY IN TOURISM ECONOMICS: SMART AND SUSTAINABLE TOURIST DESTINATIONS

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*Obliquity describes the process of achieving complex objectives indirectly. The recent emergence of the concept and paradigm of intelligent or smart tourist destinations has given rise to a proliferation, often driven by publicly and privately financed technologically-based companies, of initiatives to convert many tourism destinations into smart tourism destinations (STDs). In theory, the concept of the smart tourist destination includes different levels of action in the environmental, social and technological fields, directed at enhancing the satisfaction and experience of tourists. However, in many practical applications of the concept only the latter level is addressed and the other dimensions are neglected. This article argues that the STDs represent the first real opportunity to make the concept of sustainable tourism operational. This argument is based on the fact that for the first time, the intensive use of technology involved in implementing an STD will enable the continuous measurement of aspects related to sustainability which, until now, in the absence of this technology, were difficult or impossible to measure, and therefore, manage.*

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**Keywords:** *Obliquity, Smart tourist destinations; Sustainable Tourism; Technology.*

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## **INTRODUCTION**

According with Kay (2011:3), obliquity “describes the process of achieving complex objectives indirectly”. The recent emergence of the concept and paradigm of smart tourist destinations has given rise to a proliferation, often driven by publicly and privately financed technologically-based companies, of initiatives to convert many tourism destinations into smart tourism destinations (STDs). In theory, the concept of the smart tourist destination includes different levels of action in the environmental, social and technological fields, directed at enhancing the satisfaction and experience of tourists. However, in many practical applications of the concept only the latter level is addressed and the other dimensions are neglected.

This note argues that the STDs represent the first real opportunity to make the concept of sustainable tourism operational, doing it in an obliquity manner. Specifically, in the case mass tourism destinations. Focusing solely on the practice of implementing technology to improve the satisfaction and experience of tourists means renouncing important advantages that a full application of the concept would generate. This argument is based on the fact that for the first time, the intensive use of technology involved in implementing an STD will enable the continuous measurement of aspects related to sustainability which, until now, in the absence of this technology, were difficult or impossible to measure, and therefore, manage.

## **THE INHERENT FLEXIBILITY OF TOURIST DESTINATIONS**

Tourist destinations are flexible and dynamic entities. On a territorial level, the delimitation of destinations – national, regional, local, etc. – has given rise to different entities with different management problems and needs. With respect to time, destinations

are alive, they evolve and their life cycles develop in unison with the tastes and needs of the tourists who visit them and the values and decisions of their residents and managers (Butler, 1980). Massification and the stretched carrying capacity in some of these destinations is currently giving rise to tourism demand management strategies which include intelligent destinations oriented towards sustainability as a clear response to these issues.

When applying intelligence to tourist destinations their dynamic and flexible nature must be respected. Therefore, it is inadvisable to adopt standardised solutions proposed by consultants and technologically-based companies, which for the sake of their own interests, propose the indiscriminate application to all types of destination.

## **THE SMART TOURIST DESTINATION**

The many aspects of the STD include sustainability. Without sustainability, a destination cannot be conceptualised as an STD. In addition to sustainability, other elements encompassed by the STD are technology – connectivity and sensorisation, the intelligent information system and innovation – and the governance of the destination (Agencia Valenciana de Turismo, 2015).

The concept is therefore ambitious: if it has not been possible, to date, to attain this sought-after sustainability, it would seem complicated to implement an even wider framework, namely intelligence, in which sustainability is simply one of its elements. However, this vision is simplistic as it does not take into account the potential interactions that the intensive use of technology can have in the formula.

In this context, the opportunities arising from aspects such as sensorisation or big data, with the monitoring and measurement of all types of tourist behaviour and subsystems of the destination (water, waste, urban mobility management etc.), can contribute to determining the real benefits and costs of each tourism development

model. The profitability of these models and their influence on the decisions about which of them is likely to be favoured by the policy-makers can be established.

## **THE SUSTAINABLE TOURIST DESTINATION IN PRACTICE: THE CASE OF SPAIN**

Spain is one of the countries where the concept of the smart tourist destination is taking off. Thanks to institutions such as Segittur, there are many destinations throughout the country which have embraced the concept and have initiated projects so that they may become STDs (Segittur, 2015).

However, by simply consulting the Platform for Government Contracts (the website which provides information about Spain's public procurement), or by simply googling the terms "solicitation document" and "intelligent (the word used in Spanish for this kind of destinations) tourist destination", we can appreciate the indiscriminate nature with which many actions are being implemented.

In many cases, actions are focused on creating tourist websites which bring together all of the information of a destination in one platform in order to facilitate visitors' search tasks and to promote the intensive use of social media in order to disseminate this information. In more advanced cases, actions consist in making free public Wi-Fi available to tourists. Little more has been done.

Although these actions, valued by tourists, constitute a first step towards applying technology to improve the tourist experience, particularly in those destinations that are starting from scratch, they are far-removed from the action required to shape real intelligence in destination management – not to mention that some of these destinations are usually, due to the low incidence or specialisation in tourism, those that have fewer sustainability problems.

On the other hand, consolidated destinations, where considerable problems of sustainability prevail, already have the basic tools and

require other comprehensive destination management tools which, going beyond the interface and services provided to the tourist, enable a real measurement of the tourism impact and the territorial management. The effective operation of these platforms in many cases depends on the collaboration and sharing of information by the stakeholders of the destination.

However, at least in the case of Spain, it can be observed that this advanced application of the smart tourism concept often clashes with the current reality of companies and institutions in the destinations. A reluctance to share information and doubts with respect to the returns to be gained from the intensive investment in technology in tourism businesses and destinations represent a limitation for the technologies inherent in the STD to be used to their maximum potential. In this case, there is a risk of facing a true “technological paradox” in which increasingly more sophisticated destinations with technological tools continue to work essentially under the same unsustainable principles prior to this implementation

## **CONCLUSIONS**

In contrast to other types of technology such as military technology, the concept of the STD represents one of the most commendable applications of technology, as its purpose is the enjoyment and well-being of human beings. This note argues that the application of the STD concept represents the first real opportunity to make operational what, to date, has been a mere desideratum; sustainability in tourist destinations. This is done in an oblique way, due to the general failure of the direct approach to this problem. The consequences of climate change and their impact on tourism undoubtedly reinforce the need to apply sustainability measures to STDs.

However, if these measures are not applied correctly, in other words, they do not respect the necessary flexibility and dynamism of

each of the destinations in question – the principles of intelligence, the concept of STD runs the risk of becoming undermined and, as is the current case of sustainability, will be relegated to a rhetorical use or, in the best of cases, used as a marketing element with which to differentiate tourism destinations, which are essentially the same.

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## **TOURISM DESTINATION-COMPETENCY AS AN ANTECEDENT TO TOURISM STAKEHOLDERS' ENGAGEMENT AT THE DESTINATION**

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*Stakeholders in tourism are broadly classified as players of supply-side and demand-side. The comparative and competitive advantage that a destination possesses over similar other destinations heighten the engagement and commitment of supply-side stakeholders for further investment in the tourism sector and thereby business enlargement at the destination. Thus, framing proper stakeholder management policies and strategies are important for any tourist destination to enhance and sustain its competitiveness in both domestic and international markets. This article presents an analytical framework to explore whether tourism destination competitiveness with a mediating effect of destination-supplier fit lead to supply-side stakeholders' engagement at the destination which could facilitate a clearer understanding of the nature of tourism stakeholders' reactions to tourism, so that the results could help tourism planners and policy-makers to develop more appropriate destination products as well as to enhance competitiveness in tourism markets in turn.*

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**Keywords:** *destination competency, stakeholder engagement, social exchange theory, stakeholder-destination fit*

## INTRODUCTION

In the context of tourism, the attractiveness of destination as well as networks and collaboration among stakeholders are principal means by which policy makers and planners can meet their specific motives and thus reach sustainable development of destination. Thus, framing proper stakeholder management policies and strategies are important for any tourist destination to enhance and sustain its competitiveness in both domestic and international markets. It is extremely critical if the destination has already crossed its carrying capacity and reached a saturated market level. According to UNWTO, tourism establishments and tourism enterprises, including their associations are important stakeholders in tourism development (UNWTO report 2005). Yoon (2002) demonstrated that tourism suppliers' support and participation are among the most important factors in the tourism business; their professional involvement, knowledge, and practical experiences regarding tourism attraction planning and development must be reliable sources of developing tourism planning programs and strategies in order to enhance destination competitiveness (p.40). Policy makers and practitioners acknowledge the importance of inter-organizational relationship among stakeholders which are likely influenced by the success of Destination Management Organization (Angelo Presenza and Maria Cipollina, 2010). The attractiveness of destinations and administrative efficiency of respective DMOs are the critical factors which may influence stakeholders' engagement at the destinations. Most of the studies in this area dealt with the factors which were found to be influencing the competitiveness of destinations. These factors shape the characteristics of destinations which ultimately attract the tourists to the destination. However, even though studies on tourism destination competitiveness (TDC) have been conducted from various perspectives, its influence on stakeholder engagement at

the destination with a mediating factor of destination fit has not been clearly addressed yet.

Thus, the study presents an analytical framework grounded on social exchange theory taking perceived destination competitiveness as an antecedent to stakeholders' engagement with mediating effect of stakeholder- general environment of destination fit. This could facilitate a clearer understanding of the nature of tourism stakeholders' reactions to tourism and help tourism planners and policy-makers to develop more appropriate destination products thereby enhancing tourism development. The rest of the article is divided into three sections. The first one discusses the background of the study reviewing the related works and conceptual issues. The second section explains the outcome and research implication of the study. The last section concludes the paper by highlighting the need for enhancing the competency of tourism destination to engage tourism stakeholders in the same and thereby tourism development.

## **REVIEW OF RELATED LITERATURE**

The influence of destination characteristics (destination competency) on stakeholders' engagement is depends on the congruence between the stakeholders in the destination and the destination as a whole. Therefore, a more comprehensive approach to understand the phenomenon of tourism stakeholders' engagement in the destination will help in promoting tourism. The conceptual framework presented in the article proposes relationships between the different factors identified from various fields such as tourism management, stakeholder management, human resource management and literature on social exchange theories. Some of these relationships are evident, whereas others are being proposed to further explore the interaction between the destination competency factors that influence stakeholder engagement in an organizational setting. These relationships are discussed in detail in subsequent sections.

## **Social Exchange Theory In Tourism Stakeholder Management**

Social exchange theory is basically rooted in “utilitarianism” and has its origin in various disciplines like economics, anthropology, and psychology. It rests on the principle that people are reward-seeking and punishment-avoiding creatures, motivated to action by the expectation of profits; that is, rewards minus costs, investments, and foregone rewards (Ap John, 1992; Kim Kyoung 2013; Kayat, 2002). Resources and rewards are more likely social, political or psychological nature and not mere of monetary terms (Napier and Bryant, 1980). In particular, social exchange theory involves a game of expectations of perceived benefits and perceived costs or trading of tangible and intangible resources between individuals and groups. Some studies in tourism management describe the perception of various tourism stakeholders on tourism development by using social exchange theory as a basic theoretical framework (Perdue et al., 1990; Jurowski et al., 1997; Gursoy et al., 2002; McGehee & Andereck, 2004; Kuvan & Akan, 2005; Abbasi D.S & Badaruddin Mohamed 2013, Yoon et.al 2001; Yoon 2002). Most of these studies show residents' evaluations on prospects and consequences of tourism development, and their level of support and engagement for further tourism development in their particular regions.

From a tourism viewpoint, social exchange means that the stakeholders who have personal benefit or dependency on the industry tend to have a more positive perception of destination attractive factors, policies, and strategies. The article based on social exchange theory postulates that stakeholders’ (suppliers’) attitudes toward tourism industry at the destination, and subsequent level of engagement at the destination, will be influenced by their evaluation of resulting outcomes in the destination. Thus grounded on social exchange theory, stakeholder analysis approach is taken into consideration here for understanding stakeholder preferences,

interrelations, the influence of resources and their engagement in destinations.

## **Stakeholder Analysis Approach**

Stakeholder analysis, not a single tool, rather it consists of different methodologies for analyzing stakeholder interest in an organization or a particular environment (Crosby,1992). Stakeholder analysis insists on the fact that, for evaluating strength and opportunities of an organization and thus framing proper strategic management policies, the interests and influence of stakeholders should be taken into consideration (Mason and Mitroff 1981; Brugha and Varvasovszky 2000). While conducting the analysis, one of the key issues arising is stakeholders' identification with respect to those particular organization contexts (Brugha and Varvasovszky 2000). With information on stakeholders, their interests, and their influence, the policy makers and planners can decide on how to best accommodate them, thus assuring policies adopted are viable, representative and sustainable.

## **WHO ARE STAKEHOLDERS?**

The definition of stakeholders varies among scholars. Freeman defined stakeholders as units (such as groups and individuals) capable of exerting influence or being influenced by the achievement of organizations objectives (Freeman, 1984). The significance of stakeholder may change as the motives that organization are concerned with change (Mitchel et al 1997; Frooman 1999)

Tourism development, especially policy-making and planning, has accepted stakeholder concept because tourism development has been accompanied by complicated stakeholder groups with different interest and ideas about the cost and benefits of the development (Kim Kyoung 2013). In the context of stakeholder theory, Pavlovich

(2003) stated that the tourism destination generally comprises different types of complementary and competing organizations, multiple sectors, infrastructure and an array of public/private linkages that create diverse and highly fragmented supply structure (p.203). The intricate networks prevailing in tourism sector make the identification of stakeholders more complicate (Sautter and Leisen, 1999; Buhalis, 1999). In tourism, the key destination stakeholders can be identified, classified according to their goals and examined based on either of unrequited or reciprocal influences (S. Timur and Donald Gets, 2008).

The common examples of tourism stakeholders in supply-side are national governments, local governments, tourism establishments and tourism enterprises, including their associations, institutions engaged in financing tourism projects tourism employees, tourism professionals, tourism consultants, trade unions of tourism employees, tourism education and training centers, local populations and host communities, non-governmental organizations specializing in tourism and directly involved in tourism projects and the supply of tourism services (UNWTO Report 2005). The three main components of tourism supply are considered to be accommodation, transport, and intermediaries (travel agents and tour operators) (Sinclair and Stabler 1997). These service providers/suppliers are important stakeholders of the tourism industry of any destination. In this process, the supplier must have the commonly prescribed entrepreneurial traits along with service sector specialties.

### **Stakeholder Engagement At The Destination**

The competitive micro environment of destination is an important determinant of competitiveness of destination (Dwyer and Kim, 2004, Crouch and Ritchie, 1995). It relates to the network, commitment, and engagement of tourism entrepreneurs/stakeholders at the destination and is termed as situational conditions of destination. According to Neil Jeffrey,

“Stakeholder engagement is premised on the notion that those groups who can affect or are affected by the achievements of an organization’s purpose’ should be given the opportunity to comment and input into the development of decisions that affect them. Meaningful engagement occurs when organizations are aware of the changes in the society and how they relate to organization performance, choose to establish relations with stakeholders as a means to manage the impact of those changes”.

Stakeholder engagement is the process used by an organization to engage relevant stakeholders for a purpose to achieve accepted outcomes (AccountAbility, 2008). Thus engagement is not merely an outcome but acts as a way to build a better relationship within the organization or a particular setting which eventually lead to improved business performance.

In human resource management, engagement is a latent construct driven by vigour, dedication, and absorption (Schaufeli, et.al. 2009; Hakonen et al 2008; Bakker and Demerouti 2008). Engagement is about human behavior and attitudes which involves motivation, commitment, satisfaction with the agency, a sense of alignment with organization goal and desire to work hard to achieve this goal (Kangrue F.M., 2014). Engagement at the organization is evaluated through satisfaction, identification, commitment and performance (Sacks, 2006; Kumar, 2015).

Engaged employees show loyalty towards the organization, advocacy for the organization, and candid effort to help achieve organization’s goals (Scottish social Research, 2007). As Baker et al (2008) pointed out, engaged employees put much effort into their work because they identify with it. The significance of employee engagement is more evident for an organization or agency than they themselves. When we apply employee engagement in the context of tourism, in terms of stakeholder engagement taking destination as a whole as an organization, it is proposed that a well-organized and performance oriented destination’s stakeholders (supply side) have a high level of

energy and are enthusiastic about their business and its extension in the destination. To sum up, tourism stakeholder (suppliers) engagement is a process with the end goal being the success of tourism development in the destination.

## **Stakeholder Fit On General Environment Of The Destination**

Stakeholder fit refers to the degree to which the stakeholder and destination characteristics match. Stakeholder (supplier) characteristics may include their psychological needs, values, goals, abilities, or personality, while destination characteristics could include intrinsic and extrinsic rewards, role, cultural values, or characteristics of other stakeholders. The concept is adapted from person–environment fit (Kristof-Brown, et. al, 2005; Muchinsky and Monahan, 1987; Beasley, et. al, 2012). Even though much of the recent theories and empirical investigations of P-E fit have come from industrial-organization psychology and business management, past research has been focused on applying the theory in to other fields too such as particular community settings, mutual help support groups etc. ([Tracey, et. al 1986](#); [Buffum, 1988](#); [Lehmann, et.al,1978](#); [Segal et al., 1989](#); [Humphreys & Woods, 1993](#); [Luke et.al,1993](#); [Mankowski et. al., 2001](#); [Mankowski, et. al, 2001](#)). Basely et.al (2012) developed a theory on general environment fit in which a scale is developed to check person’s fit with the “setting” with five theoretical dimensions such as value congruence, similarity, needs-supplies fit, demands-abilities fit, and unique contributions.

Generally, person–environment fit (P-E fit) theory proposes that the congruence between persons and their environments influences behavior and psychological functions ([Walsh, 2009](#)). Within this literature, P-E fit has been measured either directly, by explicitly asking individuals how well they fit with an environment or indirectly, by measuring both the individual and the environment ([Kristof, 1996](#)). Some examples of indirect fit include the assessment

of the values of the individual and the environment, the needs of the individual and supply of those needs by the environment, and the demands of the environment and the abilities of the individual. Individuals who do not fit into an environment may leave the setting ([Cable & DeRue, 2002](#); [Schneider, 1987](#)).

### **Destination Competency As An Antecedent To Stakeholder Engagement**

Competitiveness of an industry is a critical determinant of how well it performs in a market economy. The success of tourism destinations in world markets is influenced by their relative competitiveness. The development of tourism sector in an economy basically depends on its ability to maintain the competitive advantage in its delivery of goods and service to tourists (Dwyer L et al, 2000). Many studies (Heath and Wall 1992; Ritchie and Crouch, 1993; Hassan, 2000; Mihalic, 2000, Kozak, 2001; Dwyer and Kim, 2003; Enright and Newton, 2004; Ruhanen, 2007) theoretically and empirically contribute to the understanding of various aspects of competitiveness of tourism destinations. It was Ritchie and Crouch (1993, 2003) and Crouch and Ritchie (1999) who have done the most detailed work on overall tourism competitiveness. They have stated that ‘whereas destinations compete primarily for economic reasons, with an emphasis on attracting tourist expenditure, other motives may also underlie tourism development’ (Crouch and Ritchie, 1999, p:144). According to them the concepts of comparative and competitive advantage provide a theoretically sound basis for the development of a model for destination competitiveness

Crouch and Ritchie also pointed out that competitiveness is determined by the combination of both assets (comparative advantage) and processes (competitive advantage) where assets are inherited (e.g. natural resources) or created (e.g. infrastructures) and processes transform assets into economic results (Crouch and Ritchie,

1999). Generally, the central pillars of competitiveness of any destination are regarded as Core tourism resources, Supporting resources, Destination management policies and Situational factors. Core tourism resources and supporting resources are referred as primary elements and 'springboard' for tourism development which originated from comparative advantage of destination (Ritchie and Crouch 1993, 2003). This is analogous to 'endowed' and 'created' resources of Dwyer model (Dwyer et. al, 2004). Core tourism resources comprise of natural resources, cultural resources, and tourism superstructure such as food and lodging, entertainment available for tourists, mix of activities intended for tourists, special events designed for tourists etc. Supporting resources are mainly general infrastructure and allied facilities like accessibility to the destination. There are many other social and situational factors/resources that may directly or indirectly influence competitiveness such as hospitality of residents towards tourists and tourism industry as a whole, shopping experiences at the destination, safety, security, political stability etc. The significance of these factors vary individually according to nature and type of tourism that a destination offers. Many destinations believe that the hospitality or friendliness of their residents or employees towards visitors provides a competitive advantage. It is not enough to deliver all the attributes of an experience in a cold and detached manner (Crouch G.I., 2010). For the same reason this category is identified separately in most of destination competitiveness model (Dwyer and Kim 2003, Kresic D. and Darko Prebezac 2011, Kozak M. and Rimmington 1999). For successful utilization of comparative advantage, the destination has to strengthen its competitive advantage by proper destination management activities. Destination management activities directly reflects managerial capability of destination management organizations (DMOs). The activities undertaken by DMOs involves implement the policy and planning framework established under destination policy, planning and development, enhance the appeal of the core resources and attractors, strengthen the quality and

effectiveness of the supporting factors and adapt best to the constraints or opportunities imposed or presented by the situational conditions of destination. Competitiveness of destination greatly depends on the micro environment of the destination (Dwyer and Kim 2003, Crouch and Ritchie 1995). Micro environment of the destination refers to the efficiency of local tourism industry which consists of numerous suppliers. Competition among firms creates an environment for excellence. The competitive micro environment of the destinations includes the capabilities and strategies of firms within the tourism industry (local and foreign enterprise) and the inter-organizational dynamics including alliance formation (Dwyer et.al, 2004). These activities represent the most direct mechanism for managing the destination's competitiveness and sustainability. The entire portfolio of existing tourism resources, attractions and facilities of destination influences for suppliers' knowledge, experience, commitment and engagement at the destination (Raija Kompula, 2014).

Studies have investigated the role of tourism suppliers in the development of competitiveness of a destination (Dwyer and Kim 2003; Ritchie and Crouch 1999; Koh and Hatten 2002; Kompula Raija 2014; Rusko et.al 2009; Enright and Newton 2005; Waayers et.al 2012; Beritelli 2011). It calls for reciprocity in relationship such as competitive position of a destination which strengthen competitive micro environment of the same destination. Competition compels the service providers to innovate, use resources efficiently and respond to demands effectively. The successful performance of destination ultimately may boost stakeholders' engagement and commitment towards the destination. However, no serious effort has been seen to explore how competitiveness lead to stakeholder engagement of the destination.

## **DESTINATION COMPETENCY AND STAKEHOLDER ENGAGEMENT**

Destination competency and stakeholder destination fit is significantly important for stakeholder engagement in the destination according to the findings of the study. Implication of this may be considered for formulating strategies to promote tourism development process of the destinations. These aspects are detailed below.

### **Importance Of Perceived Destination Competency And Stakeholder Destination Fit For Stakeholder Engagement**

The model given as figure 1 originated from the assumption that favourable micro environment (such as network, commitment and engagement of tourism entrepreneurs/stakeholders at the destination) is one of the several factors that enhance competitiveness of destination, but the competency of destination is increasingly important for supplier's engagement at the destination.

Much of the TDC research has focused on identifying and evaluating the proper matches between destination resources and destination management policies mostly from tourist perspective on one side; exploring the determining factors of destination competitiveness both theoretically and empirically on other side, but a very few have gone in depth of analyzing the role of perceived competency of destination in enhancing tourism suppliers' engagement at the destination in return. Tourism attractions are evaluated either through idiographic, organisational or cognitive perspectives (Lew, 1987). Yoon (2002) stated, the idiographic perspective is related to the supply component and often assesses tourism attractions/ resources by asking public and private tourism professionals such as tourism stakeholders to ascertain which tourism resources or elements are most important to tourists and to destination attractiveness. The cognitive perspective,

the most common evaluation method is associated with the demand component, in which tourists evaluate their travel experiences, depending on the different types of tourism attractions available to them. It has been argued that while assessing competitiveness of a destination, an idiographic approach is preferred to the cognitive approach because the possibility of the latter is limited due to the short period of visiting time of tourists, and their limited knowledge of or familiarity with attractions existing in a given destination (Formica, 2000; Milman & Pizam, 1995). Thus, suppliers (resource endowments) and suppliers (resource deployment) act as the cornerstones of the tourism development process.

The product of the tourism sector is an experience that is delivered by a destination to its visitors. This experience is produced not by a single firm but by all players. The multiplicity of players involved in the supply and delivery of tourism services, and hence the varied experience of the visitor, makes management of the destination product vastly more complex compared to the management of simple products produced by single firms (Crouch, G.I., 2010). To a greater extent, the level of involvement from the part of supply-side stakeholders determines the proper matches between tourism resources and management strategies (Dwyer et al., 2000; Armenski et al., 2012). Factors of destination competitiveness shape the type and nature of tourism that a destination offers. If a destination offers serene and picturesque beaches predominantly and it might have a comparative advantage on those aspects over the other neighbouring destinations, then the destination is characterized as a beach destination and belongs to the category of island tourism or coastal tourism. Consequently, suppliers at the destinations figure out and make use of their favourable destination attractive factors and generate tourism products in such a way that would maximise their benefits.

Here, six factors of TDC have been identified that are significant by themselves but do not exert their influence on ‘stakeholder’s engagement at the destination’ in isolation. The six factors are

- i. attractiveness of destination,
- ii. quality of core tourism resources,
- iii. quality of supporting resources,
- iv. hospitality,
- v. inter-organizational relationship among suppliers, and
- vi. managerial capability of Destination Management Organisations (DMOs).

Grounded in social exchange theory, it can be stated that stakeholder’s fit with destination is an underlying mechanism through which competitive characteristics of the destination influences stakeholders’ engagement at the destination.

Figure 1: A model of perceived tourism destination competency and tourism stakeholder engagement



The model specifies that the first three factors of destination competitiveness— destination attractiveness, quality of core tourism resources and quality of supporting resources—are embedded within comparative advantage of destination, be it primary element of destination appeal or catalyst for tourism development. These are

directly related with suppliers' engagement at the destination. Whereas, hospitality of the destination (friendliness of local residents towards tourists and tourism industry) and micro competitive environment of the destination such as inter-organizational relationship among stakeholders and managerial capability of DMO boost competitive advantage position of the destination which eventually benefit the suppliers to deliver their products and services in a more demonstrative way. All the factors identified in this model do not exert the same amount of influence on suppliers' engagement in all organizational settings. The relative importance of each of these factors is influenced by the business goals and values of the DMO. The absence of one or more of these factors in an organization do not prevent suppliers' engagement at the destination. However, the model presented here proposes that the six factors of destination competitiveness are directly related to suppliers' engagement at the destinations. Suppliers-destination fit play a mediator role between destination competency and supplier engagement.

## **Implications**

With the increasing importance of the suppliers or service providers' engagement in the destination or destination management organization, there exist many opportunities for researchers in the area of tourism management to advance the understanding of destination competitiveness and suppliers engagement. The model presented in this article suggests opportunities for research that fall into the following two broad areas:

- i. Research related to destination competitiveness factors: The significance of factors of competitiveness of destinations varies according to each destination's tourism products. For a destination to be competitive and successful, it needs to have common understanding of what and where its

comparative and competitive advantage lies in terms of both natural and man-made tourism products.

- ii. Research related to application of social exchange theory in tourism development: The competitive advantage, that a destination possess over other destinations, enhances the identity of stakeholders especially on supply side, which increases the loyalty toward the destination and finally end up with their engagement at the destination, thus supporting tourism development.

The following propositions are suggested which captures the attention of both researchers and practitioners alike:

1. The nature of tourism competitiveness of a destination is complex and varies differently across destinations. Each destination has its own unique characteristics and may not be replicated. For a destination to be successful and competitive while attracting tourists, there need to have a common understanding of what and where the destination's competitive and comparative advantages rest upon.
2. Six destination competitive factors crucial to stakeholder engagement are destination attractiveness, quality of tourism resources, quality of supporting resources, hospitality, inter-organizational relationship and managerial capability of DMOs.
3. All these six factors together with destination's favourable general setting (in terms of value congruence, inter-stakeholder similarity, needs-supplies fit, demands-abilities fit, and unique contributions) create an optimum environment which boost stakeholder/supplier engagement at the destination. Highly competitive destinations satisfy the identity of stakeholders at the destination and mold their attitude towards destination attractive factors, policies and strategies positively. This enhances stakeholders'

motivation, commitment and satisfaction with the destination and develop a sense of congruence with destination goal and desire to work hard to achieve this goal. Thus, stakeholder fit with the general environment of the destination go along with destination competency factors likely influencing stakeholder/supplier engagement at the destination.

4. Competitiveness of destination is perceived and valued differently by stakeholders at various business levels, thus affecting their level of engagement differently at the destination.

## **CONCLUSION**

An evaluation of tourism competency factors from stakeholders' view is crucial to maintain competency and sustainability of any tourism destination. The importance of stakeholder perception on tourism competency of a destination would determine their involvement, commitment and engagement at the destination. The model presented in the article is based on social exchange theory relating to stakeholder engagement in tourism destinations with comparative advantage factors of destination competitiveness, inter organizational relationship among stakeholders, effective DMOs and favourable environment of the destination. Enhancing the antecedent factors through interventions will make a positive stakeholder engagement in tourism destinations, thus favouring the development in tourism.

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## **INFLUENCE OF WORKING AGE IN ORGANIZATION ON EMPLOYEES' PERCEPTION OF IMPORTANCE OF BASIC TOURISM POLICY TYPES IN CULTURAL TOURISM**

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*The study tries to find out the influence of working age in the organization on employees' perception of the importance of basic tourism policy types in cultural tourism. The main aim is to find significant differences between employees' ages of working in the organization and basic tourism policy types in the sector of cultural tourism in Montenegro. Data were collected online, and multivariate analysis of variance was used. The study outcome points out a significant difference between the youngest and the oldest employees in organizations about the perception of supplementary tourism policy in cultural tourism. This research could be a good example for future researchers in the field of employees in organizations of cultural tourism and basic tourism policy types.*

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**Keywords:** *working age in an organization, employees' perception, fundamental tourism policy, supplementary tourism policy, cultural tourism, Montenegro*

## INTRODUCTION

Today in the global tourism market specific tourism forms are very popular. One of those specific tourism forms is a cultural tourism as a specific type of selective tourism ([Marinoski and Korunovski, 2012](#), [Hottola, 2009](#), [Cooper and Hall, 2008](#)). Cultural tourism is one of the oldest specific tourism types ([Forga and Valiente, 2014](#)) and one of the most attractive selective tourism types on the international market of selective tourism. The reasons for that are numerous.

Cultural tourism is a type of special interest tourism ([Kamble and Bouchon, 2014](#), [Lee and Bai, 2016](#), [Bujdosó et al., 2015](#), [Vatter, 2014](#)) which includes heritage tourism ([Hughes et al., 2013](#), [Martin et al., 2016](#), [Wells et al., 2015](#), [Vorontsov et al., 2015](#), [Chheang, 2011](#)). It is a type of selective tourism which positively influences tourism destinations in the economic, social, cultural and political field. Specifically, it is very known as a type of selective tourism with the highest growth rate of tourism turnover ([Wu et al., 2015](#), [Stratan et al., 2015](#), [Lussetyowati, 2015](#)).

This type of selective tourism is one of the most compatible tourism types with the concept of sustainable tourism together with ecotourism and adventure tourism. Many tourism destinations have provided sustainable economic growth and development thanks to cultural tourism. At the same time, it is the type of selective tourism which respects ecologic dimension of sustainable development and advanced cultural and social effect in the process of cultural tourism turnover.

Bearing in mind the positive sides of cultural tourism, this type of selective tourism was developing in Montenegro from the beginning of modern tourism development. Today, the sector of cultural tourism in Montenegro is one of the most developed types of selective tourism, specifically in the coastal and the central region of the state.

The sector of cultural tourism hires a respectable number of the total number of employees in the tourism sector and has a positive influence on decreasing the level of seasonality in the destination.

The product of cultural tourism is one of the most competitive sub-products of the total tourism product of Montenegro. Because of that, this type of selective tourism should be researched from different aspects. In this study, the focus is on the influence of employees' working age in the organization on the perception of the importance of basic tourism policy types in the sector of cultural tourism.

The study has research delimitations such as choice of an independent variable. There are other socio-demographic variables which could be used in the research, but the used variable is very reliable for research problem. The study has presented all of the available literature, and none sources have been intentionally omitted. The sample size could be bigger, but the results will not significantly differ from the obtained results. Several statistical procedures could be used, but multivariate analysis of variance is the most reliable for this type of study ([Hair et al., 2014](#)).

The main aim is to find out any significant differences in terms of the influence of working age in the organization on employees' perception of the importance of basic tourism policy types in cultural tourism. Hypothesis 1 - There are significant differences in the employees' perception of the importance of basic tourism policy types in the cultural tourism, using in an organization the working age of respondents who have up to three years and respondents who have seven and more years of working experience in the organization.

In the next part of the study will be presented recent researches about cultural tourism and related tourism policy. The research methodology will be presented after that. The obtained results will be

presented in detailed in the fourth part of the survey and conclusion considerations will be presented in the last part of the paper.

## LITERATURE REVIEW

The significance of tourism in the economic field of destination was the initial reason for creating tourism policy as a specific part of economic policy. Tourism policy helps destinations to advance their competence and competitiveness on the national and international level. It is a very strong development tool but also, a very complex tool.

Tourism policy had been evaluating during the time and today it is well-known as local tourism policy (Iorio and Corsale, 2014, Farmaki et al., 2015, Xing-Zhu and Qun, 2014, Di Pietro et al., 2014), regional tourism policy (Prideaux and Cooper, 2009, Costa et al., 2014, Coles et al., 2014, Raj, 2013), national tourism policy (Whitford and Ruhanen, 2010, Zhao and Timothy, 2015, Raj and Griffin, 2015, Ayikoru, 2015) and international tourism policy (Beech and Chadwick, 2008, Hall et al., 2015, Hall, 2011). Tourism policy can be classified from the aspect of different criteria. Above classification was based on territorial criteria.

The basic classification of tourism policy was made according to the criteria of the essence of tourism policy action. From that aspect, tourism policy could be classified as fundamental and supplementary tourism policy. Fundamental tourism policy is focused on general goals of development of tourism, and supplementary tourism policy is focused on specific goals of tourism development in the destination. (Vučetić, 2009)

Tourism policy is under the influence of many internal and external factors of a tourism destination. One of the internal factors could be the employees' working age in an organization in the sector of cultural tourism. This factor is usually connected with work experience (Robbins and Coulter, 2016, Zeng, 2015, Duerden et al., 2015). From the point of engagement length in the organization of the sector of cultural tourism, the employee could be a part-time employee (Griffin, 2016, Evans, 2015) and full-time employee (Mattel, 2016, Blancas et al., 2015).

Working age is very important characteristic of employees because the increase in working age increases the probability of employees' participation in well-paid job activities (Ferreira Freire Guimarães and Silva, 2016). Percent of working-age in labor force is different between female and male from country to country. In developed countries, the share of female employees is higher compared with developing and transitional countries (Ferrante, 2016).

Better work experience, i.e., higher experience in working age should give better job opportunities to employees (Sutherland, 2015). Today, European Union countries have increased the number of post-working age population because of the process of aging of the society (Katsoni, 2015), what directly influence the tourism sector and the sector of cultural tourism of European Union. The population has aged, and there are more and more people with working age experience without a job. This trend has influence in increasing voluntary job activities (Bernini and Cracolici, 2015) in all economy sector including the tourism sector and the sector of cultural tourism.

The U.S. population is also aging, and the proportion of the population with working age experience will decline from 62.7 percent (today) to 56.9 percent by 2060 (Schermerhorn, 2014). This trend will produce more people with less working age experience (Pearlman and Schaffer, 2013). Employees throughout working age have a higher quality of knowledge and skills (Banerjee et al., 2015), i.e., competencies, what is necessary to be successful in any job activities. That could be applied in any economy sector including the sector of cultural tourism. Employees in the sector of cultural tourism should have many different sorts of competencies including the ability to recognize basic tourism policy types. This means that employees in the sector of cultural tourism can be able to recognize even basic measures and activities of tourism policy which could influence on growth and development of destination of cultural tourism.

In this survey, classification into part-time and full-time employees is not useful. Therefore, employees in the sector of cultural tourism are classified into three groups: first group – employees up to three years of working in an organization; second group – employees

from four to six years of working in an organization; and third group – for seven and more years of working in an organization.

## RESEARCH METHODOLOGY

Participants in the survey were employees in the sector of cultural tourism in Montenegro. A sample size is  $n = 746$ . The share of respondents by the working age in the organization is 36.3 percent of respondents up to three years of working in an organization, 20.6 percent of respondents from four to six years of working in an organization and 43.1 percent of respondents from seven and more years of working in the organization.

Independent variables were basic tourism policy types (TP), i.e., fundamental tourism policy (FTP) and supplementary tourism policy (STP). Dependent variables were working age in an organization (WAO), i.e., up to three years of working in an organization (WAO-1), four to six year of working in an organization (WAO-2), and seven and more years of working in an organization (WAO-3).

Employees from the sector of cultural tourism in Montenegro, could answer the question (How many years do you working in this organization in the sector of cultural tourism in Montenegro?) using one of the offered answers: strongly disagree ( $j = -2$ ), disagree ( $j = -1$ ), neutral ( $j = 0$ ), agree ( $j = +1$ ), and strongly agree ( $j = +2$ ). The survey has been carried out online, and without influencing respondents' answers.

Data were analyzed by IBM SPSS Statistic software (Field, 2009), and by using statistical procedures factor analysis and multivariate analysis of variance (Lopez-Bonilla and Lopez-Bonilla, 2014). The main aim of the study is to find significant differences between dependent variable - working age in the organization and independent variable - basic tourism policy types.

## RESULTS

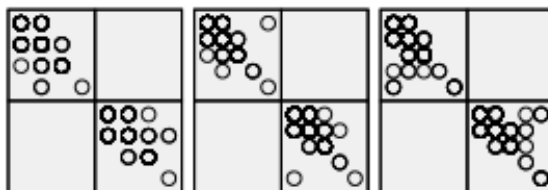
Minimum sample size with the middle impact of simple size on research results for F tests (Doane and Seward, 2011) and multivariate analysis of variance determine Pillai  $V = 0.25$ , Effect size  $f^2(V) = 0.3333333$ ,  $\alpha$  error prob. = 0.05, Power = 0.80 is  $n = 70$ .

**Table 1. Descriptive**

Variables		Mean	Trimmed Mean	Variance	Std. Deviation	Skewness	Kurtosis
FTP	WAO-1	1,1255	1,1886	,666	,81589	-1,142	2,387
	WAO-2	1,1234	1,1443	,475	,68911	-,287	-,427
	WAO-3	1,1495	1,1904	,553	,74335	-,753	1,132
STP	WAO-1	,9852	1,0720	,852	,92284	-1,053	1,481
	WAO-2	1,0974	1,1299	,572	,75641	-,439	-,336
	WAO-3	1,1620	1,2008	,574	,75741	-,627	,251

The above results indicate that there is no extreme value in the sample and that the assumption of normality of distribution is violated. This is usual for the social science research. None of the dependent variables in combination with independent variable has a Gaussian curve. All the data are skewed left. Out of the total number, fairly skewed of data has 33.3 percent, moderately skewed of data has 33.3 percent and highly skewed of data have 33.3 percent. All the combinations of the variable have a platykurtic flatness of data. This mean, that hypothesis  $H_0$  (hypothesis of the normal distribution of data) should be rejected for all the working-age groups. Research sample size has no untypical points.

**Figure 1.** Matrix scatter plot of independent variables by groups of working-age in an organization



The above figure indicates that linearity of the variable is fulfilled. The minimum value of the maximum deviation with a significant

level of alpha .01 is .060. For Kolmogorov-Smirnov test results are for: respondents with up to three years of working in an organization – FTP has Sig. = ,269 and STP has Sig. = ,267; respondents from four to six year of working in an organization – FTP has Sig. = ,272 and STP has Sig. = ,247; and respondents from six and more years of working in an organization – FTP has Sig. = ,258 and STP has Sig. = ,238. Shapiro-Wilk test results are for: respondents with up to three years of working in an organization – FTP has Sig. = ,791 and STP has Sig. = ,821; respondents from four to six year of working in an organization – FTP has Sig. = ,808 and STP has Sig. = ,826; and respondents from six and more years of working in an organization – FTP has Sig. = ,805 and STP has Sig. = ,814.

All Spearman correlation results are with high value. They are for respondents with up to three years of working in an organization  $r = ,617$ , respondents from four to six year of working in an organization  $r = ,682$ , and respondents for six and more years of working in an organization  $r = ,752$ . The non-variable combination has characteristic of singularity or multicollinearity.

The results of Box's test have shown that Box's  $M = 47,021$ ,  $F = 7,803$ ,  $df1 = 6$ ,  $df2 = 3045433,087$ , and  $Sig. = ,000$ . Levene's test of equality of error variances has shown that FTP has  $Sig. = ,386$  and STP has  $Sig. = ,526$ . Robust tests of equality of means have shown that: FTP has –  $Sig. = ,904$  for Welch and  $Sig. = ,904$  for Brown-Forsythe; and STP has –  $Sig. = ,043$  for Welch and  $Sig. = ,031$  for Brown-Forsythe. The assumption of homogeneity of a matrix of variance and covariance is partially violated.

**Table 2.** Multivariate tests

Effect	Value	F	Hypothesis df	Error df	Sig.	Partial Eta Squared	
Intercept	Pillai's Trace	,683	799,197	2,000	742,000	,000	,683

TP	Pillai's Trace	,015	2,800	4,000	1486,000	,025	,007
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Results of multivariate tests confirm that there is a difference in employees' perception of the importance of basic tourism policy types from the point of employees' working age in an organization. Table 2 does not show which group of working-age it is in an organization and how high the significant result is.

**Table 3.** Tests of between-subjects' effects

Source	Dependent Variables	Type III Sum of Squares	df	Mean Square	F	Sig.	Partial Eta Squared
TP	FTP	,113	2	,057	,098	,907	,000
	STP	4,623	2	2,312	3,428	,033	,009

Results in the table 3 confirm that significant differences dependent on STP. Supplementary tourism policy explains 0.9 percent of the variance in the results of measuring employees' perception of the importance of working age in an organization in the sector of cultural tourism.

## CONCLUSION

Using the Bonferroni's method of adjustment (Field, 2009), the main significant differences are less than ,025. In employees' perception of basic tourism policy in the sector of cultural tourism significant difference was manifested within supplementary tourism policy and between interviewed employees' groups from up to three years of working in an organization and for seven and more years of

working in an organization ( $MD_{(I-J)} = ,17675$ ,  $SD = ,06774$ ,  $Sig. = ,025$ ).

A significant difference was shown between the youngest and the oldest employees' groups in interviewed organizations in the sector of cultural tourism in Montenegro. There are two basic reasons for this influence of working age in an organization on employees' perception about the importance of basic tourism policy types in cultural tourism.

Firstly, the majority of the youngest employees in an organization in the sector of cultural tourism are generally younger workers, and the majority of the oldest employees are generally older workers. It is usual, especially in the sector of cultural tourism, that the youngest employees have a weaker knowledge about tourism policy, compared to the oldest employees.

Secondly, the problem is more complex when it is about supplementary tourism policy because even the oldest employees do not have a clear picture what it is. The youngest employees usually do simple and work-intensive business activities. Besides that, work experience confers with the length of years in business.

Policymakers in the field of tourism policy, specifically in the field of supplementary tourism policy should bear in mind that employees from the sector of cultural tourism do not have enough education about specific tourism policy measures and activities. On the other hand, they should respect shown differences between the youngest and the oldest employees in the sector of cultural tourism, when they try to formulate an optimal set of specific measures and activities of tourism policy.

Research limitation is that the survey was conducted and analyzed in transitional tourism destination and maybe the results would be different in developed tourism destination, but not significantly different from the results of this study. Theoretical implication is the necessity of better theoretic clarifying the essence of supplementary tourism policy in the sector of cultural tourism. The practical implication is that employees should be better informed and trained about supplementary tourism policy by the policymakers and managers, specifically the youngest employees. Recommendation for future research is to use another socio-demographic variable of employees.

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**THE ROLE OF FOLK CULTURE IN THE  
PROMOTING TOURISM**

**(A CASE OF FOLKLORE OF OTANAHA FORT IN  
GORONTALO PROVINCE, INDONESIA)**

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*Gorontalo City embodies highly valuable tourism potentials to reveal. The city offers not only physical attractions for the tourists to please their eyes but also values of the objects that live along with the highlighted events within the historical timeline. Among the historical objects is Otanaha Fort, a tourist spot in Gorontalo, named after the place's feature of historical legend. Many believe that stories and legends behind the naming of a place or an object are highly related to the socio-cultural life of the ancient society. With that in mind, a study is essential to carry out and to reveal the historical events that lie behind tourism objects with the aims of enriching insights of local people. Such an effort is undertaken as a support of*

*local contents acquisition to be capable of extending the information of a tourism object for the locals.*

*The study aims to carry out the historical overview of Otanaha Fort as a supporting element of cultural tourism in Gorontalo. The researchers employed field survey and interview to obtain the data and folklore analysis to approach the research object. The result shows that the folklore of Otanaha Fort is a manifestation of features of social events of Gorontalo in the ancient times that depict the record of past events. The historical facts are further packaged in the form of imaginative fable for people to enjoy as an act of historical preservation. The evidence of the historical facts is observable by data tracking within the naming process of the objects, site or tombstone of influential figures of the story, preservation of address of traditional titles related to the figures, and distinct building techniques observable in the fort's architecture.*

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**Keywords:** *culture, folklore, Lahilote, tourism potential*

## **INTRODUCTION**

Tourism sector contributes 14.13% on the province's Gross Regional Domestic Product in 2011 (Regional Mid-term Development Plan of Gorontalo Province 2012-2017, 2011). Gorontalo City is full of hidden tourism gems to be brought to the surface. The potencies of tourism income in Gorontalo can be classified into natural tourism, historical tourism, marine tourism, cultural tourism, and religious tourism; all integrate into a form of tourism area, if managed properly, it acts as a support in terms of empowering local people as key actors in the tourism business. The idea of expanding tourism potential is supported by Gorontalo government, one of which is by participating in domestic and international tourism promotion events. However, the result is far from optimal, due to lack of information of tourism potentials in Gorontalo, hindering the government to spread the tourism promotion to attract visitors optimally.

There are various tourism potentials to be discovered in a single tourism object. The number of potencies in a tourism object goes in line with the opportunities of utilisation. Soekadijo (2008) once asserts that the potencies in a tourism spot are capitals to be developed into tourist attractions *in situ* (inside the place) or *ex situ* (outside the place). In this case, physical attractions are not always the priority for the tourists; but the historical values of the objects are also approachable as tourism commodity.

Among the historical objects is Otanaha Fort, a tourist spot in Gorontalo, named after the place's feature of historical legend. This leads us to questions that it is possible that stories and legends behind the naming of a place or an object are highly related to the socio-cultural life of society in ancient times. Henceforth, it is significant to conduct a study to reveal the historical events that lie behind tourism objects to enrich the locals' insights as well as their knowledge.

The previous statements are the fundamental reasons for the significance of research on Otanaha Fort. This research employs culture-oriented folklore approach, in which it attempts to elaborate the historical features of the legend of Otanaha Fort in the form of story transcription and narration to be promoted as a historical tourism potential, along with efforts of historical conservation to become local features.

Generally, the unique feature of a culture is a magnet to attract visitors (Correia et al., 2011). Canavan (2016) also highlights the significance of cultural tourism as a tool to unite concepts in tourism school of thought and to provide holistic, flexible, and reflective tourism. Moreover, Correia et al. (2011) state that cultural features of a region play major contribution towards a preference of tourist destination. With that in mind, it is advised to perform sustainable development of cultural tourism. The notion is in line with Qian et al. (2016) that one of the key factors of sustainable tourism is the development of local-oriented tourism in which the community contributes the most.

Well-implemented promotions of tour destinations emphasising on the local community are believed to make a significant contribution to the Local Own-source Revenue of Gorontalo and the multiplying process of domestic economic development surrounding the destinations. Community-based tourism, by Vitasurya (2015) and Qian et al. (2016), can further grow the community's interest in natural preservation (e.g., tourism waste management), making the tourists comfortable and thus stay for longer period. Furthermore, local wisdom-oriented tourism can be one of the fundamentals of sustainable tourism development, if supported by the proactive participation of the community in developing supporting tourism infrastructures and media. (Vitasurya, 2015)

Furthermore, this study is expected to identify and disseminate the existence of tourism potentials in Gorontalo and the historical features related by approaching using folklore as its scope of the study. Etymologically, the term 'folklore' derived from English 'folk' and 'lore' (Danandjaja, 2005) Dundes (Ibid, 2005) defines it as a group of people which shares identical features of physical, social and cultural aspects distinctive to other cultures. By that, Bascom (in Danandjaja, 2005) formulates that a folklore consists of three main groups, i.e., myth, legend, and folktale. The myth is a kind of folklore in which the community believes that it happened in the pastimes and considers it as a sacred event and played by god-like or superpower entities. Such event is perceived as sacred that sometimes the community believes that it happened in another realm. Moreover, the legend is folklore, also considered as a sacred event that happens and takes place in history. What makes it different from myth and legend is that legend tends to be secular and occurs in not-too distant past as well as in the human realm. Legend is sometimes considered as 'collective' history (in other terms, 'folk' history), despite that it is prone to narration distortion over ages since legends are generally unwritten and spread traditionally. Furthermore, legend tends to be migratory, in another way, it can spread from its origin to other regions.

## **RESEARCH METHOD**

This study employed folklore approach, in which the researchers engaged field survey and interview to obtain the data and descriptive data analysis on local wisdom applied in the surrounding community regarding Otanaha Fort as the research object. Furthermore, the researchers highlighted the folklore of the naming process of the fort from a sociological point of view. By folklore approach, the story behind the naming process of Otanaha fort is further treated as social fact. For that reason, the object of analysis concerned with sociological and cultural aspects of the community. This is in line with Danandjaya (in Endraswara, 2009) who asserts that motives of folklore analysis are inextricably tied to its cultural features. By folklore approach, it means that the study attempted to review from the cultural morphology of the story as a means of development of science. Therefore, it is expected to correlate the community's speech culture (in this case, the folklore) and the tourism potentials to develop Otanaha Fort as one of Gorontalo's main destinations.

## **FINDINGS AND DISCUSSIONS**

### **a. Geographical Condition of Otanaha Fort**

Gorontalo City is located at the longitude of 122° 59' 44" - 123° 05' 59"E and latitude of 0° 28' 17" - 0° 35' 56"N. It has an area of 64.79 km<sup>2</sup>, about 0.55% of total area of Gorontalo Province. Sharing its border with Gorontalo Regency and Bone Bolango Regency, Gorontalo City consists of nine districts, i.e., Kota Selatan, Kota Utara, Kota Barat, Kota Timur, Kota Tengah, Dungingi, Dumbo Raya, Hulonthalangi, and Sibatana district.

There are at least eleven renowned tourism objects in the city, i.e., Otanaha Fort, The Sacred Tomb of Kali Baluntha, The Sacred Tomb of Ju Panggola, The Sacred Tomb of Nene Tabibi, The Sacred Tomb of Haji Bu'ulu, The Sacred Tomb of Ta Ja'ilo'yibuo, The Sacred

Tomb of Pulubanga, The Sacred Tomb of Dutongo Pitu Loludu, The Sacred Tomb of Ta Ilayabe, Hunto Mosque, and Footprint of Lahilote Site.

Otanaha Fort is located at the longitude of 123° 00' 25.2" E and latitude of 0° 32' 57.4" N. Otanaha Fort is built approximately in 1522 AD by King Ilato by support from the captain of Portuguese ship as a mean of strengthening the kingdom's security from enemy threats. The materials of construction of Otanaha Fort are sand, limestone, and egg of Maleo bird as its adhesive material.

Otanaha Fort is located on a hill where the visitor needs to pass through 348 stairs and four stopovers to reach the fort. One of the distinct features of Otanaha fort is in the stairs composition that the total of stairs from one stopover to another is different to each other. From the bottom to the top, passing through four stopovers, visitors must pass through 52, 83, 53, 89, and 71 stairs respectively. The stopovers are provided as checkpoint place to rest and gather energy before proceeding to the top.

b. The Story Behind Otanaha Fort

Otanaha is derived from *ota* and *naha*; both are in Gorontalo language. *Ota* means fort, while *naha* stands for the name of the founder. Thus, *Otanaha* means 'a fort founded by Naha'. The history records that Naha founded the fort in 1585. There is two more fortresses inside the Otanaha fort, i.e. Otahiya, as a shelter for Naha's spouse, Otahiya, and Ulupahu, for Naha's son Pahu. Ulupahu derived from Gorontalo language phrase *u wole pahu*, which means Pahu's (fort). Otanaha fort is the oldest between three and made of mixtures of limestone, sand, and egg white of Maleo bird. There is a famous tale behind the fort repeatedly spread by the locals; eventually, the tale is considered as a legend in the community, particularly for the locals in Dembe subdistrict, Gorontalo.

The tale is about the origin of the fort, which is initiated by Ndoaba and Tili'aya; both are daughters of King Ilato. King Ilato, with his sister Princess Tolangohula, is said to descend from the sky, in another word, they are said as 'eggs falling from the heavens'. Ilato

and Tolangohula are addressed the customary title, in which Ilato is said as *Ta Lonto Hulungo* (man descended from the sky), and Tolangohula is addressed as *Ta Lobuta'a to Putito* (lady coming out of an egg). Ndoba and Tili'aya are the daughter of Ilato with his spouse, Queen Molo'u from Maluku. Both of them are the masterminds behind the building of Otanaha Fort, as a symbol of resistance against Portuguese invasion at the time. To get stronger, they asked for help to King of Gowa (Makassar).

On their journey coming home, Ndoba and Tili'aya were escorted by a company of four brave ship captains (Lakoro, Lakandjo, Laguna and Djaelani). Upon their arrival, the ship captains refused to go back to Makassar and stayed instead to help Ndoba and Tili'aya to formulate tactical strategies to seize back the land of Molo'u. It was also an act of prevention before the Portuguese invaders arrive in Gorontalo, since the land of Maluku had been conquered, and it is likely that the next stop will be Gorontalo. Having assured of the likelihood, Ndoba and Tili'aya gathered forces and strength to plan an ambush for the Portuguese, since they were not strong enough to face it frontally. Ndoba and Tili'aya assured that if they grow their strength altogether, they could win the battle. To anticipate any threats, Ndoba and Tili'aya also initiated to build strong forts as a mean of protection and defense from future aggressions. Therefore, these three forts are built to protect Gorontalo people from threats, later to be founded and named by Naha. During the construction process, some parts of current Gorontalo land were once sea floors, thus, providing an ease of the raw material transport.

c. Folklore Analysis of Otanaha Fortress

1) Related to events of object

Gorontalo society is renowned as a society that upholds and preserves its cultural and customary values from generations to generations, including natural preservation efforts. The cultural values of Gorontalo society lie on the fundamental philosophy of characteristic of nature. By growing bonds with nature, Gorontalo

people believe that there is a supernatural realm, in which it is inhabited by spirits and beautiful fairies, that seldom transform themselves as human (coming down from the sky). The spirits are treated as gods and believed to bear supernatural power and control of the universe. In the living philosophy of Gorontalo people, there are four basic elements of nature, which are believed to be the substantial compounds of the universe, i.e. *huta* (earth), *taluhu* (water), *dupoto* (wind), and *tulu* (fire). This also applies to the story behind Otanaha Fort. The place setting is a hill shaped like a mound (*huntu*) inhabited by a beautiful princess from the spirits realm. It is elaborated in the following quote:

Once upon a time, on a place called *huntu lo bohu*, there lived seven ladies named Bui Bungale, Bui Dalahu, Bui Bindelo, Langgi Ihe, and others (not narrated). It is said that the seven ladies were descendants of the spirits from Gowa land in Makassar and lived the earth since the ancient times.

## 2. Beliefs of supernatural powers

Some tourist destinations in Gorontalo are associated with the presence of beings with supernatural and magical power, e.g., Limboto Lake, Lahilote footprints site, the great Panipi, and others. In the story behind Otanaha Fort, Ilato is believed to bear supernatural power, as narrated in the following quote:

A man is named *Ilato* (Lightning), as his appearance mimics the traits of lightning. The history told that Ilato is the person beneath the tomb of Ju Panggola inside Al-Mukarramah Mosque in Dembe. During the moment he appeared, an egg from sky cracked, and he disappeared in the blink of eyes to where the sun rises (East), leaving young child named Tolangohula to be nurtured by Bui Bungale until her adulthood.

## 2) Related to traditional titles addressed to the characters

Gorontalo culture is highly associated with traditional title award for some people, either related to family or the community. (Baruadi, 2011) Traditional titles within society are generally

awarded to position holders during their lifetime (*pulanga*), or after their death (*gara'i*). Some characters in the tale of Otanaha Fort were also awarded traditional titles, as quoted as follows:

It is believed that the real identity of Ju Panggola inside Al-Mukarramah Mosque in Dembe is King Ilato himself. Ju Panggola is also called *Du Panggola* as it is easier by Gorontalo accent to pronounce. The lady is named *Tolangohula* which stands for moonshine, as her beauty shines magnificently. Ilato and Tolangohula are addressed as *Ta Lonto Huwa* (from the land of Gowa), *Ta Lonto Hulungo* (man descended from the sky) and *Ta Lobuta'a to Putito* (lady coming out of an egg).

3) Related to the prerequisites of a leader in Gorontalo

One of the basic prerequisites to become a leader in Gorontalo is *buheli* (bravery). Moreover, the candidate needs to possess the power or inherit the power from ancestors. Most of the folktale in Gorontalo is about beings with supernatural power and wisdom. This is depicted in the tale of Otanaha Fort, as follows:

As explained previously, Ndoaba and Tili'aya are daughters of Ilato and Queen of Molo'u. It is written in the history that Ilato is somewhat different to normal human being since he was originated from something supernatural. He was quiet, hard worker, wise, and respected by the society for his words of gentle and politeness. It is for that trait that he was appointed as the leader of the community, besides of his sacred and magical powers.

4) Related to the traits of mutual cooperation and unity within the society

Gorontalo society is well-known for their characteristic of mutual cooperation in every layer of their activity. The traits are reflected in their actions to cooperate and work together in accomplishing tasks. The society forms work group, i.e., *hulunga*, *huyula*, *ambuwa*, *timo'a*, *dembula*, and others, all are formed to develop bonds within their cooperation. Related to the tale, when

building the forts, Ndoba and Tili'aya also asked for help from the community, as a symbol of resistance against the Portuguese invasion. It is depicted in the following text:

The Portuguese are surely far stronger, but Ndoba and Tili'aya believed that only by cooperation they could win the battle. To prevent and avoid aggressions, they built forts to prepare for attacks on Limboto-Gorontalo land.

The analysis result is supported by interview results with the local community. It is quite an irony that currently, the tale of Otanaha only spreads within a particular group of the community. The tale only spreads within limited groups of elders. Most of Gorontalo people are unaware of the tale; almost all young generations even do not have the willingness to know and preserve the spread of the tale. As time progresses, the researchers are afraid that the tale of Otanaha will slowly be forgotten and extinct. This is due to the well-informed people of the story are currently in their elder stages. Aside from that, current progressive age tends to endorse people to not believe in supernatural tales. Some even consider that the tales are too exaggerated and hyperbolic. Nevertheless, there are some sides who value the tales as daily moral lessons and advise for future generations.

## **CONCLUSION**

The previous analysis shows that the folklore of Otanaha Fortress is a manifestation of features of social events of Gorontalo ancient society. Consisted of record of past events, the historical facts are packaged in the form of imaginative fable for people to enjoy as an act of historical preservation. These are examples of the social facts applied in the society: (1) The naming process of a place is associated with its origins, such as *huntu lo ti'opo* (pile of cottons) and *huntu lo bohu* (piles of coals), as observable in real life. The naming process of Otanaha Fort is also based on the story, where the founder's name Naha is referred to the fort, along with his spouse and son (Otahiya,

and Ulupahu); (2) The Tomb of Ju Panggola inside the site of Al Mukarramah Mosque is the remainder of the history of Otanaha Fort, in which Ju Panggola is a traditional title awarded to King Ilato. The tomb is currently treated as a tourist destination, in which the visitors come for religious pilgrimage and (3) The presence of traditional titles to the current position holders as a heritage from the ancient times. As in the tale of Otanaha, the titles were awarded to Ilato and Tolangohula, as follows: (a) *Ta Lonto Huwa* (Those who come from Gowa); (b) *Ta Lonto Hulungo* (Those who descend from the sky); (c) *Manuruni* (Coming from the sky), and (d) *Ta Lobuta'a to Putito* (Lady coming out of an egg) and (4) The presence of Otanaha Fort is also a proof of the technology of the society of that time in the architecture of the building, e.g., houses and fort. An interesting fact to notice that the strong materials and construction techniques of the fort only used limestone, sand, and egg white of Maleo bird as adhesives, in which Maleo bird is currently an endangered species, making the material composition difficult to replicate.

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## **A CASE FOR USING OF SOCIAL NETWORK ANALYSIS IN TOURISM MARKETING STUDIES.**

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*The aim of this research note is to present an overview of the application of social network analysis in tourism marketing studies. The objectives are to discuss the application of this research tool in field of tourism marketing studies, identify theoretical benefits, main contributors and core research streams. Based on these, we present relevant research gaps and the identification of research opportunities for future application of social network analysis in tourism marketing studies.*

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**Keywords:** *Social Network Analysis, Tourism Marketing*

### **INTRODUCTION**

Tourism can be considered a fragmented, complex, transversal, relational phenomenon, involving multiple stakeholders, from multiple sectors, public, private and hybrid entities. Organizational networks have been identified as an appropriate governance model for tourism. First, it is one of the economic sectors incorporating greatest diversity of activities, sectors, organizations and partnerships (Jesus & Franco, 2016). The majority of tourism firms are micro or small-sized enterprises with limited resources, thus they need to develop formal and informal interorganizational collaboration (Ying, Norman & Zhou, 2016). Second, considering the multitude of actors involved, the relationships between stakeholders are hard to manage, limiting the forms of governance that could be successfully applied. Organizational networks facilitate stakeholder participation,

contribute to improve the quality of the service being offered and also facilitate inter-organizational learning, innovation diffusion and knowledge sharing, including the transmission of marketing data. Finally, organizational networks constitute a viable alternative to public sector management of the tourism sector and respond to an outcry for a more managerial perspective on governance for the sector in which the role of the government is restricted to act as a network broker (Van der Zee & Vanneste, 2015).

Social network theory is a useful approach for tourism studies because it is perfectly adapted to the study of the tourism phenomenon where networks assume capital importance. Network theory facilitates the understanding of the structure and the interactions between stakeholders, including leadership and influence between actors (Tran, Jeeva & Pourabedin, 2016) and allows processes for the transmission of resources, customers, information and knowledge to be evaluated (Merinero-Rodríguez & Pulido-Fernandez, 2016). Under this perspective, analyses are conducted on patterns of relationships rather than concentrating upon the attributes and behaviors of single individuals or organizations.

## **THEORETICAL CONTEXT**

SNA uses a set of tools and techniques to analyze how the topological or structural properties of networks influences its overall dynamic and can be used to explain a wide number of processes, including the formation of opinions, leadership, influence, diffusion of information as well as the robustness of the system to external shocks.

A network is a set of actors connected by a set of ties. The actors, often called *nodes*, can be persons, teams, organizations, concepts, etc. Ties connect pairs of actors and can be directed (i.e., potentially one-directional, as in giving advice to someone) or undirected (as in being physically proximate) and can be dichotomous or valued (Borgatti & Foster, 2003). A network is normally represented by a drawing in which the various elements are shown as dots and the connections among them as lines linking pairs of dots. This drawing, a mathematical abstraction, is called a graph and the branch of mathematics known as graph theory establishes the framework providing the formal language to describe it and its features (Baggio,

Scott & Cooper, 2010). The graph can also be represented by a square adjacency matrix. The identification between the graph and the adjacency matrix makes the methods of linear algebra available to network analysis. The multi-disciplinary origin of network science has led to a wide variety of quantitative measurements of their topological characteristics.

The basic assumption of social network theory is that the structure of social interactions (relationships) influences individual decisions, beliefs and behavior of individuals or organizations. To study social networks various methods of analysis have been employed, including qualitative approaches and quantitative methods. Network analysis has its origin in three research streams: i) the socio-metric perspective, that developed the graph theory; ii) the Harvard perspective, which pioneered the use of inter-relational models and cliques and, after 1970, developed the algebraic models of network analysis and; iii) the anthropologist perspective of the Manchester School, which focused on the analysis of structural relations (Nogueira & Pinho, 2015).

SNA has undergone major application in social sciences in recent decades because of its capacity to analyze the mathematical properties of patterns of social interactions, shaping structural research on social phenomena (Merinero-Rodríguez & Pulido-Fernandez, 2016). Network analysis has been employed in sociology, political sciences, geography, business and management studies.

## **SOCIAL NETWORK ANALYSIS IN TOURISM MARKETING STUDIES**

For the purpose of this analysis, tourism marketing is understood according to the definition proposed by Dolnicar and Ring (2014), which is an adaptation to tourism of Grönroos' (2006) notorious conceptualization of marketing.

Customer focus that permeates organizational functions and processes and is geared towards making promises relating to products and services required when travelling to and staying in places outside one's usual environment for leisure, business

and other purposes for less than one year, enabling the fulfilment of individual expectations created by such promises, and fulfilling such expectations through support to customers' value-generating processes. (Dolnicar & Ring, 2014, p.44)

This definition implies that organizations' marketing processes consist of making promises, enabling such promises and fulfilling expectations that tourist consumers develop based on the promises made. Knowledge generated through tourism marketing research can therefore be classified into the content areas of making, enabling or keeping promises (Dolnicar & Ring, 2014).

From a marketing perspective, SNA has been applied in several research areas, including: i) the analysis of distribution channels (e.g. Tran et al., 2016; Feige, 2013); ii) consumer behavior (e.g. Ronchetto, Hutt & Reingen, 1989; Benoit & Van Den Poel, 2012; Iacobucci, Henderson, Marcati & Chang, 1996); iii) word-of-mouth (e.g. Williams, Inversini, Buhalis & Ferdinand, 2015; Groeger & Buttle, 2016; Goldenberg, Libai & Muller, 2001); iv) promotion and communication (e.g. Zhang, Bhattacharyya & Ram, 2016) v) relationship marketing (e.g. Iacobucci & Ostrom, 1996; Mattsson, 1997; Achrol, 1997); vi) leadership and influence (e.g. Al-garadi, Varathan & Ravan, 2016; Faraj, Kudaravalli & Wasko, 2015) and ; vii) new product development and adoption (e.g. Banica, Brinzea & Radulescu, 2015; Lee, 2015).

In tourism marketing studies, the application of SNA is still limited and mostly relates to research about stakeholder involvement in destination marketing, destination image or branding (e.g. Aarstad, Ness & Haugland, 2015; Cakmak & Isaac, 2012; Marzano & Scott, 2009; Mazanec, 2010; Nogueira & Pinho, 2015; Sheehan, Ritchie & Hudson, 2007), thus it can be classified in the content areas of making and enabling promises. No studies were found that actually draw upon the evaluation of tourism networks, including its capacity to fulfill marketing promises, for example by trying to quantify the objective benefits of tourism networks. Most studies adopt a more descriptive perspective, explaining how stakeholders interact to marketing places and the structure and types of interactions established.

The argument in favor of the application of SNA in tourism marketing studies is supported by the importance of marketing interactions in the sector. Nogueira and Pinho (2015) used SNA to study stakeholder interactions in a Portuguese National Park (Peneda-Gerês), founding that marketing information interactions were the most dense among local stakeholders.

Some literature links the mathematical properties of tourism networks with marketing strategies. For example, Aarstad et al. (2015) applied SNA, combined with surveys, to research co-branding practices in a destination context, concluding that interfirm network position (closeness centrality) is related to the use of the destination brand as an explicit marketing strategy. Once again, the nature of these studies is predominantly descriptive, not prescriptive.

SNA has also been used in tourism marketing studies to research the effect of online word-of-mouth (eWOM) in consumer behaviour. Williams et. al. (2015) using a combination of SNA and content analysis examines eWOM in twitter relayed with a tourism destination (Bournemouth) when a festival (Bournemouth Air Show 2013) occurred, founding that key users are usually prominent individuals and that festivals act as both a direct generator as well as an online animator of eWOM about tourism destinations. In another example, Money (2000) used network analysis to study eWOM referrals in the business of corporate travel services, founding that culture has more impact than location in the referral process.

These examples illustrate how marketing networks are important in tourism, from both the supply and demand perspectives, and how the study of network relationships, trough SNA, can be instrumental to advance knowledge about tourism marketing. However, research using SNA in tourism marketing studies is still scarce, a paradox that may be related with the relative novelty of this research technique in social studies.

Although SNA has been consensually applauded as an important research tool in tourism research, there are also some critics in the literature. Some authors raise questions about the epistemological legitimacy of applying network analysis, a methodology grounded on mathematics and physics, to a social activity such as tourism (Baggio et al., 2010).

On many occasions full enumeration of data regarding a network is not possible, especially for social and economic systems, and this is certainly the case for a tourism destination (Baggio et al., 2010). Networks are difficult to define, they can be formal or informal, and their elements can belong to more than one network simultaneously (Jesus & Franco, 2016). Furthermore, most literature focuses on the relationships or networks within a specific tourism destination whereas the stakeholders in tourism can be located in different locations and not necessarily in the same tourism destination (Tran et al., 2016).

Another potential weakness of mathematically based network analysis is that “snapshots” of a situation do not allow for an understanding of network development over time (Albrech, 2013; Tran et al., 2016). Most studies research networks form a static perspective failing to address the dynamic nature of tourism.

## **RESEARCH OPPORTUNITIES**

Empirical studies unpacking the roles of network relationships in destination marketing remain exploratory and single case-based. Multi comparative studies are needed to uncover patterns and generalize conclusions. There is also the need to ascertain how qualitative and mathematical properties of networks combine and to analyze their impact on tourism activity (Merinero-Rodríguez & Pulido-Fernandez, 2016). In addition, analyzing network dynamics with the consideration of time is suitable for the network analysis where actors are changing frequently. There is still a lack of research of relationship dynamics in networks (Tran et al., 2016).

Place attractions, which are managed by public and private entities, can be understood as individual nodes in a social network that can establish relationships to promote, market and brand places. Research is needed to understand the structural linkage between such tourism social networks and destination image and destination branding.

Finally, the recent evolution of marketing theory to a service-dominant (S-D) logic (Vargo & Lusch, 2004) can also represent research opportunities for tourism marketing research. For example, SNA could be used to study some fundamental premises of SD-logic

applied to tourism such as that value is cocreated by multiple actors, including the beneficiary (visitor or tourist).

## CONCLUSION

Organizational networks have been identified as an appropriate governance model for tourism because of its complex nature. Considering that networks are a natural form of organization of the industry, social network theory can be considered a useful approach for tourism studies since it allows the understanding of the structure and the interactions between key tourism stakeholders. SNA constitutes an increasingly applied research tool in both tourism studies and marketing. However, in tourism marketing studies, the application of SNA is still limited and mostly related to research about actors' involvement in destination marketing, destination image or branding. The scarcity of tourism marketing studies using SNA contrasts with the significant potentialities of this research tool, a paradox that could be related with the relative novelty of this research technique in social studies.

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## **DETERMINING THE EFFICIENCY OF TOURISM INDUSTRY IN CHABAHAR FREE ZONE BY USING DATA ENVELOPMENT ANALYSIS (DEA) METHOD**

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*Basically, many developed any developing countries need to expand tourism activities for accessing to the goals of national economic development and attracting foreign funds, therefore evaluating the efficiency of tourism industry can have significant help in recognizing the existed tourism potentials. The Chabahar zone in spite of numerous potential abilities in attracting domestic and foreign tourists and despite the fact that it is known as one of the important poles of tourism in Iran, but it is not so successful in attracting tourists. The present research has been provided to access to the efficiency of tourism industry in this area. For analyzing the information, the Data Envelopment Analysis Method (DEA) have been used. According to the results, the technical, management and scale efficiencies are 0.58, 0.69 and 0.84 percent respectively. It is suggested to strengthen the marketing, advertising and doing appropriate transportation infrastructure by employing manpower and efficient and expert management.*

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**Keywords:** *Tourism, Efficiency, Data Envelopment Analysis, Chabahar.*

### **INTRODUCTION**

Tourism is considered as worldwide industry which includes hundreds of millions of people who travel at both national and

international levels each year (Mason, 2015, p.4). Tourism is a phenomenon with different social functions which plays a crucial role in many aspects including environment, culture and economy (Saukkonen, Honkanen, Ritola-Pesonen, 2013, p.264). Tourism dominates overall dimension of our society. There is a close connection between tourism and other academic matters like geography, economics, history, language, psychology, marketing, business and law, etc beside its considerable importance on economic boost, human socio-cultural movements and environmental development (Tourism and Hospitality Studies, 2013, p.11). Today's, domestic and international tourism are considered as an essential way for fostering the use of goods and services of local businesses besides providing job opportunities for them (Huang, Chen, Ting, 2017, P.).

The estimation of the world economy through tourism industry was US\$7.6 trillion (10.2% of global GDP) and creating 292 million jobs (1 in 10 jobs on the planet) in 2016. Accordingly, international visitors reached a peak at 1.2 billion in 2016 which had an enormous climb of 46 million between 2016 and 2015. The upward trends in tourism are expected to continue rising in the following decade (The travel and Tourism Competitiveness Report, 2017, P.3). Not only tourism industry can create economic stability but also can provide many job opportunities (Bui, So, Kwek & Rynne, 2017, p.47)

Currently, Asia has become one of the most attractive regions for tourists compared with other areas (Cohen & Cohen, 2015, Bui & et al, 2017, p.47). In Iran, income from tourism between 2014 and 2015 was more than 32 billion dollars, which 19 million and 900 thousand foreign tourist entered the country during this time. According to the World Tourism and Travel Council (WTTC), tourism in Iran will grow well in 2017 and the number of incoming tourists with a growth of 11.6% will increase to 5,531,000. Based on the report, number of tourists entering Iran will exceed 10 million in 2027, while according to domestic plans, Iran will have to reach 20 million tourists by 2020. According to the WTTC, the direct contribution of tourism to Iran's GDP in 2016 reached \$11.9 billion, which is about 209 percent of the country's gross domestic product. Also it is predicted that in 2017, the tourism sector will face a growth of 7.5 percent, with an average annual growth of 2.6 percent over the next decade, reaching \$ 16.6 billion, a figure that is about 2.7 percent of GDP in the country in 2027. This decline, despite the growth of tourism, indicates that other

sectors in Iran will grow more than tourism, one of which is oil (Statistics of Central Bank of the Islamic Republic of Iran, 2016).

Whereas tourism is considered as a dynamic and competitive industry because of its desired results, tourism development has become a main aim to improve quality of life especially in developing countries.

As tourism is a popular development strategy in each country, productivity and efficiency in this field can be a useful way to improve different sub-sections in this industry. One of the useful tool to measure efficiency and performance is Data Envelopment Analysis (DEA) which is known as emerging topic and an essential mathematical tool and it has been considered in various management parts (Emrouznejad & Yang, 2017, p.2).

A non-parametric method which is used to analyze the relative efficiency of operating units that have the identical goals and objectives is Data Envelopment Analysis (DEA) (Charnes et al. 1978, Wober, 2007, p.92). DEA is very useful and popular for many reasons; first, there is no requirement for functional form, thus; it can manage different inputs and outputs. Second, the simple version of DEA does not need the input of the price data (Anderson, 1999, p.48). DEA which is a non-parametric method has two main advantages: one is that considering a functional form for the production technology is not essential; two, dealing with multi output production technologies is possible (Corne, 2015, p.92). CCR and BCC models are the two most popular DEA models which were developed by Charnes, Cooper, and Rhodes (1978) and Banker, Charnes, and Cooper (1984) respectively.

DEA is considered as a programming-based method for measuring the performance of organizational units regarding their peers. Handling many inputs and outputs and not requiring a production function can be regarded as the main benefit of DEA. Because of this, DEA has been popular among readers. Mainly, the DEA models which are used in tourism articles assumed that the inputs were transformed to the outputs through one production process (Chang, 2017, p.79). DEA from the lenses of tourism destination management not only highlights the best performance of destinations, but also considers a stage for practices of the performance improvement (Barros, 2005; Pestan et al., 2011, p.141).

Therefore, in the present research, analyzing the tourism efficiency of the Chabahar free zone as one of the southeastern tourism areas in Iran and connected to free waters is considered. This area has special potentials in tourism indicators, but because of inappropriate management, it does not have high efficiency and necessity of examining this issue is important. Particularly, the innovation of present research is just analyzing the efficiency of the mentioned area using the Data Envelopment Analysis method for the first time.

In this study, we try to answer this fundamental question that does the tourism industry of Chabahar with all available facilities have the capability and flexibility that we can increase the tourism rate in it and with the same input, get more output? Can the Chabahar tourism industry be considered as an efficient industry considering the inputs provided for it and the amount of output that can be achieved? For answering the considered fundamental questions and due to the capabilities of the data envelopment analysis method, this method was used to answer the fundamental questions.

## **LITERATURE REVIEW**

Reviewing the background of the research demonstrates that studying tourism efficiency in different parts of the world was considered by many researchers and this point indicates the importance and status of the subject.

After the end of the second world war, researchers have provided a great deal of interest in studying and analyzing issues related to efficiency and productivity and in this regard, in 1957 the famous Solo article was published about these issues and reviewing them. From 1957 onward, the efficiency issue was seriously discussed and analyzed among economists and foundation of new methods for studying the productivity and efficiency at the micro level was established in practice. Generally, new perspectives focused on the following two issues:

1. The way of defining the efficiency and productivity
2. The way of calculating and measuring the efficiency and productivity

The main assumption in this field was that production firms may work inefficiently that this itself referred to the concept of frontier

production function for measuring the efficiency (Kumbhakar et al, 1991).

There are 10,300 DEA-related papers in the literature in the last four decades (1978-2016). Particularly, the numbers of articles has acceded to just about 1000 published works in each year in the last three years (2014, 2015 and 2016). Generally, the development status of DEA-related articles can be classified into three stages: (1) from 1978 to 1994, the growth of DEA-related articles was slow in numbers ; (2) from 1995 to 2003, the growth of DEA-related articles was stable and the average number of published articles was relatively 134 in each year ; (3) from 2004 to the present, the number of DEA-related articles represent the “exponential” increase and the average number of articles accedes about 680 per year. The latest ones display relatively 1000 papers per year (Emruznejad & Yang, 2017, p.2).

There are different sub-categories for tourism industry, for example hospitality, transportation, tour operators/travel agencies, etc. Since the 1990s, many scholars intended to examine the measurement of tourism efficiency and a great deal of researches have used production frontier models (Barros, Botti, Peypoch, Robinot, et al., 2011; Botti, Briec, & Cliquet, 2009; Corne, 2015, p.92). Based on Wober (2007) “efficient frontier techniques have been used extensively in the past, but now tourism researchers have discovered DEA to investigate the efficiency of their industry”. Indeed, the contribution of tourism is estimated only 1.34% of all the DEA application articles (Liu, Lu, Lu, & Lin, 2013).

Pestana et al (2011) used the Data Envelopment Analysis (DEA) two-stage procedure for assessment and comparison of French tourism destinations. Firstly, efficiency score were measured and then bootstrapped truncated regression model was used for the second stage. The significance of this kind of analysis in the context of France was highlighted, particularly when the country faced with a decline in the field of tourism competition. This article offered an analysis of D-attraction and E-attraction besides policy recommendations.

Huang, Chen and Ting (2017) developed an approach to evaluate the performance for promoting tourism. The significant difference in this study in comparison to the previous DEA models is that multiple efficiencies were evaluated in a single DEA implementation and overall efficiency was assessed in a ratio index. Additionally, Cultural

tourism promotion was considered as a basis to formulate the empirical evaluation about variables. The data were gathered from twenty regions in Taiwan to analyze the proposed model.

Change et al (2017) explained the main reasons for different results of three cruise lines operating incomes and net incomes. They evaluated the efficiency of the top three cruise lines to form a network DEA model for analyzing the cruise performance at two stages named operating and non-operating stages. Additionally a bootstrapped-truncated regression model was used to examine the determinants of the efficiencies. In general, the efficiency of cruise lines was illustrated, however, they were diverse in the efficiency of the non-operating stage. Since there were heavy interest payments coming from the great debt-to-capital ratio, the attempts of Cruise lines to expand the capacity were ineffective. Furthermore, the financial risks which are related to the neglected hedging policy increased its ineffectiveness.

At first Hruschka (1986) and Banker and Morey (1986a) applied DEA to the hospitality industry in general, and to the restaurants in particular. Then, Bell & Morey (1994, 1995) employed DEA to determine the best ways for participating of the travel agencies. Anderson (1999) used a stochastic frontier method to estimate managerial efficiency levels in the hotel industry. The two-stage DEA models for analyzing the tourist hotel industry was used by Yu and Lee (2009), Chiu and Huang (2011), and Lin, Chiu, and Huang (2012), Oukil, Channouf, Al-Zaidi (2016); The concept of intermediate input and output was added into the two-stage model by Chiu, Huang, and Ma (2011), Chiu, Huang, and Ting (2011), Chiu, Huang, and Chen (2012); and Yu and Lin (2008), Yu (2010), Hsieh and Lin (2010), Wang, Lu, Huang, and Lee(2013), Huang, Ho, and Chiu (2014), Huang, Chiu, Fang, and Shen (2014), and other scholars rectified the two-stage into a network framework.

The hierarchical category Data Envelopment Analysis (DEA) model was used by Corne (2015) to improve the understanding of the French tourism paradox. Pestana & et al (2011) tried to assess and compare the performance of French tourism destination through the two-stage procedure of Data Envelopment Analysis (DEA). A novel system was presented by Alzua-Sorzabal (2015) to confirm the efficiency of the internet as an important marketing channel by using Data Envelopment Analysis. A nonparametric technique (DEA) was

used by Sigala & et al.(2004) to suggest a new way of assessing ICT productivity.

## **METHODOLOGY**

The efficiency has a very comprehensive concept and it has been discussed and analyzed mostly in three fields of engineering, management and economics. Pharell is one of the people who has more activities in the field of efficiency and he also proposed a method for its evaluation. He defined the efficiency as producing an output enough, more than a given amount of input (Bjurek et al, 1990).

Different methods of measuring the efficiency which were presented by various researchers can be divided into two categories of parametric and nonparametric. The parametric method is the method in which at first a particular form is considered for the production function. Then, with one of the methods of estimating functions which are common in statistics and econometrics, the unknown coefficients (parameters) of the function are estimated. And the most important of them are as follows (Coelli et al, 2002):

- ✓ Deterministic Frontier Production Function Method
- ✓ Deterministic statistical Frontier Production Function Method
- ✓ Stochastically Frontier Production Function Method
- ✓ Profit Function

One of the methods in order to evaluate the efficiency is the nonparametric method, in this method using the mathematical programming techniques, the efficiencies of the firms are evaluated, in this method there is no need to estimate the production function. If the desired firm has several different outputs, this method will not have any problems in evaluating the efficiency. The data envelopment analysis method can be introduced as one of the nonparametric methods and in this method using the mathematical programming technique, the desired units are evaluated using the DEAP<sub>2.1</sub>. According to Figure 1, it is assumed that a firm produces the product Y using the two inputs  $X_1$  and  $X_2$  and under the condition of constant return to scale.

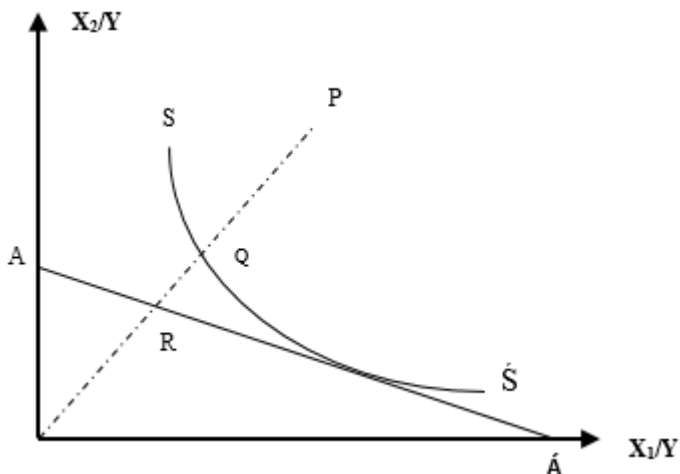


Figure 1: the technical, economic and allocative efficiencies

Knowing that  $\dot{S}\dot{S}$  of the curve represents the similar production of an entirely efficient firm. The firm has no technical efficiency at point P, this inefficiency is related to some of the inputs which can be decreased relatively, without reducing the product. Usually this amount of reduction in inputs is expressed as a percentage. Here, the amount of input which can be reduced to achieve the full technical efficiency is equal to the  $QP / OP$  ratio, which represents a decreasing percentage in inputs in order to achieve the full technical efficiency in production. Generally, the technical efficiency is shown as follows (Cooper et al, 2000):

$$TE_i = \frac{OQ}{OP} \quad \text{or} \quad TE_i = 1 - \frac{QP}{OP}$$

The values of the aforementioned ratio are between (0 and 1), the value one represents the full efficiency. As an example, the point Q in the diagram of Figure 1 represents the full efficiency, because it is on the entirely efficient frontier of similar production. All the points located on this frontier are quite efficient technically. If the ratio of the input price is represented by means of the line slope of the similar price  $A\dot{A}$ , the allocative efficiency can be obtained for the mentioned

firm. For this purpose, the allocative efficiency for a firm that produces at the point P is obtained from the following equation:

$$AE_i = \frac{OR}{OQ}$$

It should be considered that the distance RQ represents the decreasing prices in the production, without reducing the amount of production. By combining the technical and allocative efficiencies, the total efficiency (economic efficiency) is obtained. The economic efficiency is shown as follows:

$$EE_i = \frac{OR}{OP} \Rightarrow EE_i = TE_i \times AE_i = \left( \frac{OQ}{OP} \right) \times \left( \frac{OR}{OQ} \right) = \frac{OR}{OP}$$

The values of all three types of efficiencies are in range (0 and 1) (Coelli et al, 2002).

### **Data envelopment analysis method (DEA)**

The data envelopment analysis method uses the input and product data of each production unit for constructing a nonparametric production frontier, in this case all the observed units are placed on or under the envelopment frontier. Hence, the efficiency of each production unit to the efficiencies of all production units are measured in the sample. In this method, the units are not compared with a predefined standard level or a well-defined and distinct function, but the evaluation criterion is the performance of decision-making units that they provide similar activities under the same conditions. In this method, instead of determining the frontier production function, the performance of firms with the highest output to input ratio are considered as the efficiency frontier. So, the relative efficiency of the studied firms is the result of comparing the studied firms with each other. The benefit of linear programming method is the point that there is no need to specify the form of the function, but in this method, random impulses are not considered and all deviations from the efficient frontier are considered as inefficiencies (Bjurek et al., 1990).

The models of data envelopment analysis can be product-oriented or input-oriented. In product-oriented models, the goal is to maximize production according to a given amount of inputs, but in input-oriented method, the goal is to use the minimum input according to a given level of the product. Data envelopment level (both product-oriented and input-oriented) can have the constant return to scale or variable return to scale (Bjurek et al, 1990).

### Constant return to scale model (CRS)

This model is an input-oriented model which was proposed by Charnes et al (1978). The CRS pattern is expressed as follows:

$$\begin{aligned} & \text{MIN}_{\theta, \lambda} \quad \theta \\ & \text{s.t.} \quad -y_i + Y\lambda \geq 0 \\ & \quad \quad \theta x_i - X\lambda \geq 0 \\ & \quad \quad \lambda \geq 0 \end{aligned}$$

$\theta$  is a number,  $\lambda$  the vector  $N \times 1$  of the constant value,  $X_i$  column vector of inputs for the  $i^{\text{th}}$  firm,  $y_i$  column vector of outputs for the  $i^{\text{th}}$  firm,  $X$  the matrix  $K \times N$  of inputs,  $Y$  the matrix  $M \times N$  of outputs,  $K$  number of inputs,  $M$  number of outputs and  $N$  is the number of firms. The value of  $\theta$  demonstrates the technical efficiency rate of the  $i^{\text{th}}$  firm which is less than or equal to one. The value of one represents a firm with full technical efficiency. The above linear programming problem should be solved for each firm in  $N$  order in the sample. Regarding that in nonparametric data envelopment analysis method, it may face a problem because of the parallel part of efficiency frontier with axes, because if a firm is located on the parallel part of efficient frontier with axes after correcting the efficiency, it will still be possible to reduce inputs without reducing production (if the analysis is input-oriented) which is called input slack. A similar interpretation can also be provided for product-oriented analysis, but in this method in spite of efficiency, the amount of product can still be increased and it is called output shortage. The input slack problem for the  $i^{\text{th}}$  firm will be eliminated considering the condition  $\theta x_i - X\lambda = 0$  and the slack value will be zero, also product

shortage is considered to be equal to zero concerning the constraint  $Y\lambda - y_i = 0$  that these assumptions were provided in the relation (4-1) and there is no need to correct the model (Cooper et al, 2000 and Coelli et al, 2002).

### Variable return to scale model (VRS)

The assumption of constant return to scale model is only appropriate when all firms act in an optimal scale, but some factors such as incomplete competition, limitation of financial resources and so on are the causes that a firm cannot act in an optimal scale. Therefore, Bunker et al (1984) used the CRS model to measure the return of technical efficiency measurement using the CRS model when all the firms do not act in optimal scale and because of scale efficiency, they encounter some problems and the technical efficiency achieved from this way is not pure and it is in company with scale efficiency. Hence, for separating technical efficiency from scale efficiency, the VRS model is used to measure the pure technical efficiency. By adding the constraint  $\sum \lambda = 1$  to the CRS model, the VRS model is expanded to variable return to scale (VRS):

$$\begin{aligned} & \text{MIN}_{\vartheta, \lambda} \quad \vartheta \\ & \text{s.t.} \quad -y_i + Y\lambda \geq 0 \\ & \quad \quad \vartheta x_i - X\lambda \geq 0 \\ & \quad \quad \sum \lambda = 1 \\ & \quad \quad \lambda \geq 0 \end{aligned}$$

$\sum \lambda = 1$  is the vector  $\mathbf{1} \times \mathbf{1}$  of the number one. If there is a difference between the values of technical efficiency of the firm in both CRS and VRS methods, it will show that there is a scale inefficiency and the value of scale inefficiency is the difference between the technical efficiency of both CRS and VRS methods (Cooper et al, 2000 and Coelli et al, 2002). So, the scale efficiency is obtained from the following relation:

$$SE = \frac{TE_{CRS}}{TR_{VRS}}$$

$TE_{CRS}$ : the technical efficiency obtained from the constant return to scale model.

$TE_{VRS}$ : the technical efficiency obtained from the variable return to scale model.

### **Non-increasing return to scale model (NIRS)**

$$\begin{aligned} &MIN_{\vartheta, \lambda} \quad \vartheta \\ &s.t. \quad -y_i + \gamma\lambda \geq 0 \\ &\quad \vartheta x_i - \chi\lambda \geq 0 \\ &\quad N\lambda \leq 1 \\ &\quad \lambda \geq 0 \end{aligned}$$

Despite the scale efficiency of the above models, it cannot be understood that the desired firm has a constant, increasing or decreasing return to scale. This problem can be eliminated by solving the non-increasing return to scale model. The NIRS model is obtained by correcting the VRS model by substituting the constraint  $N\lambda \leq 1$  with  $N\lambda = 1$  in the relation of the variable return to scale model. Determining the type of inefficiency to scale (increasing or decreasing) for each firm is done by comparing the values of technical efficiency of both NIRS and VRS models. If the technical efficiency values obtained from two mentioned models are not equal, the increasing return to scale of the firm will be confirmed and if the technical efficiency values obtained from two models are not equal, the decreasing return to scale will be confirmed (Cooper et al, 2000 and Coelli et al, 2002).

Free trade-industrial-tourism zone of Chabahar with an area of 140 square kilometers is located in the southeast of Iran in the Sistan and Baluchestan province and it is located in the latitudes of 25 degrees and 20 minutes of north latitude and 60 degrees and 27 minutes of east longitude in the east of Chabahar gulf and near the Oman sea. This city with an area of 13162 square kilometers covers

about 7 percent of the total area of the Sistan and Baluchestan province. Figure 2 represents the geographical location of the studied area.



Figure 2: The geographical location of Chabahar in the Sistan and Baluchestan province.

## CONCLUSION AND DISCUSSION

For obtaining the efficiency of the tourism industry of the desired zone, a series of inputs and outputs are required; the input is, in fact, what is at the disposal of that industry and the industry uses them to produce the output or outputs of the tourism industry. Therefore, in this analysis, the costs spent in the tourism industry of the area and number of employees in this industry and the output in this study are as follows: number of tourists and the incomes earned from tourism industry in the Chabahar zone. The needed statistics and information were selected from 82 people through a questionnaire by random sampling method. In Table 1, the average of technical, management and scale efficiencies were shown.

Table 1: The rates of efficiency types in tourism industry of Chabahar zone

	<b>Maximum</b>	<b>Minimum</b>	<b>Deviation</b>	<b>Average</b>
<b>The technical efficiency with constant return to scale (CRS)</b>	1	0.08	0.18	0.39
<b>The technical efficiency with variable return to scale (VRS)</b>	1	0.26	0.35	0.58
<b>Management efficiency</b>	1	0.11	0.41	0.69
<b>Scale efficiency</b>	1	0.03	0.85	0.84

The source: research findings

According to the results of Table 1, it can be noticed that the zone has the decreased potential in 61 percent of inputs and it demonstrates that the inputs can be reduced without reducing the values of outputs and with the point that the capacity and potential of tourism in the area will not be reduced. Also, the pure technical inefficiency is 42 percent and scale inefficiency is 16 percent. It means that by omitting the scale inefficiency, technical efficiency will increase from 0.39 to 0.58. In Table 2, the frequency distribution of the efficiency was represented.

Table 2: The frequency distribution in different levels of scale efficiency in Chabahar area

<b>Levels of scale efficiency (percent)</b>	<b>Number</b>	<b>Percent</b>
<b>Less than 30</b>	11	13.42
<b>30-40</b>	9	10.98
<b>40-50</b>	7	8.54
<b>50-60</b>	10	12.19
<b>60-70</b>	7	8.54
<b>70-80</b>	5	6.09
<b>80-90</b>	15	18.29
<b>90-100</b>	18	21.95

The source: research findings

According to the results of Table 2, the highest efficiency is between 90-100 percent and the lowest frequency is between 70-80 percent.

### **Suggestions**

According to the obtained results, the following suggestions are provided in order to improve the efficiency in the tourism industry of the Chabahaar zone:

- One of the main reasons of weakness of the Chabahaar free zone in the tourism sector is the lack of efficient and capable management and employing people unrelated to tourism at the head of decision-making and executive affairs. So, it is suggested to use efficient manpower and management in this field.
- Due to low efficiency, the main reason of this separation can be the long traveling distance to the area and lack of appropriate transportation infrastructure such as: airport, railway, the road and finally high traveling cost, weakness of advertising and marketing tourism and the tourist capabilities of the area are unknown and lack of proper tourism management. For improving the efficiency of manpower, (specializing the activities) determining the working tasks of each person, providing a proper working environment, developing the educational programs and creating a proper reward mechanism with the efficiency are necessary.
- Solving the problems and weaknesses of communication infrastructures of the area due to the remoteness of the Chabahaar zone from the major population centers of the country and being located at the end of the southeastern part of the country and the necessity of creating communication and transportation infrastructures is sensed.
- The weakness of advertising and identifying potentials and capacity of attracting tourist to this area is one of other factors which decreased the efficiency of tourism industry of the area, therefore it is recommended to do the necessary actions in this field.

- People participations in planning and performing tourism programs can attract tourist and perform the related programs successfully.
- Coordination between the managers of the free zone and other organs and institutes related to the tourism of the Chabahar zone.
- Proper investment in cultural sections and training the local people in order to provide appropriate communication with tourists, by providing educational courses.
- Introducing the relative benefits of Chabahar in the field of tourism investments by the managers of the area for the applicants of investment.
- Planning appropriately to reduce the costs for tourists by: creating group tours, providing special discounts by means of airline and traveling companies and hotels and offering exceptional discounts to foreign tourists for attracting more of them to this zone.
- Maintaining and recreating tourism attractions in the area in order to have sustainable development.
- Providing different festivals during the year especially in the seasons of tourism and holidays.
- Using the rich ethnic and regional culture in the tourism industry.

Defining and providing new services according to its demand and improving the quality of services are the effective factors of improving the efficiency.

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## PROMOTING EDEN DESTINATIONS IN BULGARIA – THE WAY FOR SUSTAINABLE DEVELOPMENT OF TOURISM.

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*The European Destinations of Excellence (EDEN) initiative provides the opportunity to enhance the visibility and recognition of emerging European tourist destinations, to create a platform for exchanging good practices at European level and to promote a network between award-winning destinations that could lead other destinations to adopt the model for sustainable development of tourism.*

*The EDEN project is an excellent option for destinations that do not have the necessary financial funds but want to develop tourism. It provides a chance for every tourist product to be advertised free of charge in the other EU Member States.*

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**Keywords:** *Sustainable tourism; tourist destination; EDEN destinations; promoting EDEN destination; Bulgaria.*

### INTRODUCTION

In recent decades, tourism has established itself as one of the fastest growing sectors of the world's economy. A developed tourism

sector means revenue and job opportunities. At the same time, however, tourism development also produces negative effects such as irreversible destruction of resources and values, pollution of the environment, reduction of biodiversity, destruction of the local landscape through overbuilding, social conflicts, etc.

This is an extremely significant problem, both in Bulgaria and globally. The quality of tourist destinations is strongly influenced by the balance of economic, socio-cultural and environmental factors. The high concentration of tourists and the uncontrolled overbuilding leads to loss of competitiveness of destinations. This determines the need for sustainable tourism development.

Bulgaria is a country with many competitive advantages as a tourist destination, offering a wide range of different types of mass tourism and specialized tourism. The country has enormous potential to establish itself as a year-round tourist destination. It has beautiful and varied nature, natural phenomena, excellent climatic conditions, mineral springs, rich cultural and historical heritage, authentic crafts and customs, delicious food and excellent wines.

Based on the above, it can be noted that Bulgaria is a country with a rich tourist potential in the non-traditional and little-known destinations, which can be presented with the EDEN project. This outlines the direction for the sustainable development of tourism in the country as a condition for increasing the competitiveness of Bulgarian tourism.

*The aim of this article* is to analyse the EDEN destinations in Bulgaria and to present methods for their promotion and development as a step towards outlining the road to sustainable development of tourism in the country.

The aim is achieved by solving the following specific research tasks:

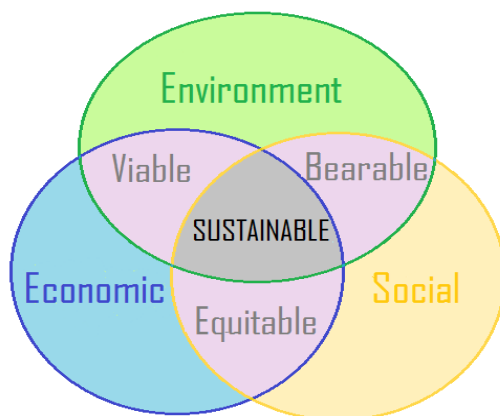
- ✓ Analysis of the essence and peculiarities of the sustainable development of tourism;
- ✓ Analysis of the nature and characteristics of EDEN destinations;
- ✓ Collection, processing and systematization of a database for EDEN destinations in Bulgaria;
- ✓ Summary analysis of EDEN destinations in Bulgaria;
- ✓ Analysis of opportunities and ways to promote and development of EDEN destinations in Bulgaria.

The methodology used in the article includes statistical methods for analysis and sociological methods for analysis - a partial standardized questionnaire and interview.

## **LITERATURE REVIEW**

Sustainable tourism is a part of the broader concept of sustainable development that arises in times of serious global problems related to the destruction of the environment and the increase of poverty. The term "sustainable development" was used for the first time in 1987 after releasing the report "Our Common Future", also known as the Brundtland Report of the World Commission on Environment and Development. In the Commission's report, sustainable development is defined as "development that meets the needs of the present without compromising the ability of future generations to meet their own needs" (Marinov, 2011). The concept of sustainable development is officially enforced and widely promoted after the Second Earth Summit in 1992 in Rio de Janeiro. Later the Brundtland Commission's sustainable development definition is complemented by the definition of the "three pillars" of sustainability - environmental friendliness, social tolerance and economic efficiency (Evrev, 2016).

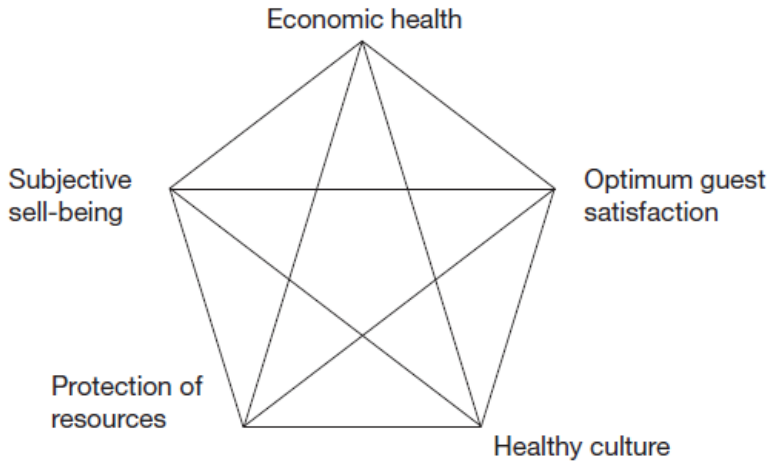
**Figure 1.** Scheme of Sustainable Development



Based on the three dimensions of sustainable development, Butler (1993) defines the concept of "sustainable tourism" as "tourism which is developed and maintained in an area (community, environment) in such a manner and at such a scale that it remains viable over an infinite period of time and does not degrade or alter the environment (human and physical) in which it exists to such a degree that it prohibits the successful development and wellbeing of other activities and processes."

According to Müller (1994), the sustainable development of tourism can be conceptualized as a "magical pentagon", within which the five goals are balanced so that none of them prevails. Each side of the pentagon refers respectively to: economic health, optimum guest satisfaction, healthy culture, protection of resources and subjective self-being (Sharpley, 2009).

**Figure 2.** Müller's 'magic pentagon'



The Countryside Commission (1995) defines the concept of sustainable tourism as: "tourism which can sustain local economies without damaging the environment on which it depends". Coccossis (1996) has suggested that there are at least four ways to interpret tourism in the context of sustainable development: a sectoral viewpoint such as the economic sustainability of tourism; an ecological viewpoint emphasizing the need for ecologically sustainable tourism; a viewpoint of the long-term viability of tourism, recognizing the competitiveness of destinations; and a viewpoint accepting tourism as part of a strategy for sustainable development throughout the physical and human environments. Bramwell (1996) notes seven dimensions of sustainability: environmental, cultural, political, economic, social, managerial and governmental (Butler, 1999).

One of the most commonly used definitions of "sustainable tourism" is that of the World Tourism Organization (1993). The WTO has given the full definition of sustainable tourism emphasizing the need to make all tourism sustainable. Expressed simply, sustainable tourism is defined as: "Tourism that takes full account of its current

and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities" (WTO, 2005).

Over the years, countries and regions where the economy is driven by the tourism industry have become increasingly concerned with the environmental, as well as the socio-cultural problems associated with the unsustainable tourism. As a result, there is now widespread agreement on the need to promote sustainable tourism development to minimize its environmental impact and to maximize socio-economic benefits at tourist destinations (Frederico, 2003).

Gradually, the development trends of mass tourism, which underlies the negative consequences of tourism, are replaced by the development of alternative tourism types and the concept of sustainable tourism development. Insufficient result of this link is the automatic assumption that mass tourism is not sustainable and therefore has nothing to do with sustainable development. In fact, some of the most ardent critics of mass tourism are the most ardent supporters of sustainable development and alternative forms of tourism, in the obvious belief that their support will lead to the disappearance of the problems of the previous one (Croall, 1995). According to the WTO, sustainable tourism development is applicable to all forms of tourism and all kinds of destinations, including mass tourism and various segments of tourist niches.

Europe is a continent full of wonderful destinations, but the truth is that many of them have lost their attractiveness due to the expansion of tourism and lack of attention to the environment. No tourist product and tourist destination can be successful for long-term period if they do not create conditions for preserving the environment in which tourism develops. As a result, the European Commission has devoted many efforts and resources to embark on the idea of sustainable tourism.

There are many cities, towns, villages that are unknown and unexploited among tourists, but have many opportunities and potential for development. In this case, through effective marketing these destinations may become part of the new tourist offer. This is an ideal opportunity for sustainable development of new tourist destinations that are not burdened by the negative consequences of mass demand and supply.

The European Commission aims to attract all these fantastic destinations into the focus of all people through the EDEN Sustainable Tourism Project. EDEN is an acronym for European Destinations of Excellence - a project that promotes sustainable tourism development across the European Union. Destinations awarded by the EDEN project are these unconventional, unique places that preserve their charm but which are often overlooked due to the popularity of other tourist sites.

The idea of the European Destinations of Excellence started in 2006 when the European Commission launched a pilot project named EDEN in an effort to rediscover the unknown paradise of new emerging destinations in different parts of the continent, remarkable by their picturesque sites, protected natural areas, traditions and cultural life (European Commission, 2008).

The project is based on national competitions that are held annually and within which a "best destination" is chosen for each participating country. By selecting destinations, the EDEN project effectively achieves the objective of drawing attention to the values, diversity and common characteristics of European tourist destinations. The project raises the popularity of the upcoming European destinations, creates a platform for exchange of best practices across Europe and promotes networking among the winning destinations. The main feature of the chosen destinations is their commitment to social, cultural and environmental sustainability.

The general objectives of the EDEN project are:

- ✓ Overcoming the seasonality of the tourist destinations at national level and presenting non-traditional and unpopular alternative forms of tourism;
- ✓ Creation of conditions for reducing the congestion of the main tourist deserts by spreading the tourist flows towards tourism by interest;
- ✓ Creation of sustainable tourism development based on the unique features of the destination in terms of culture, lifestyle, etc.;
- ✓ Increasing the opportunities for economic development of the regions, based on tourism entrepreneurship;
- ✓ Creation of conditions for protection of the environment in accordance with the European ecology norms;

- ✓ Awareness and advertising at the European level of the new opportunities for recreation and tourism.

The principle of the competition for EDEN destinations is very simple: every year a specific topic is selected by the European Commission in close cooperation with national tourism authorities. Each theme aims to show the whole diversity of Europe, including its natural resources, historical heritage, traditional holidays and local cuisine. The themes are always related to the sustainable development of tourism, whether in terms of cultural, economic or ecological focus. So far, the main themes of the initiative over the years have been:

**Table 1.** Main themes of the initiative over the years

2007	Rural tourism
2008	Intangible heritage
2009	Protected areas
2010	Aqua tourism
2011	Regeneration of physical objects
2013	Accessible tourism
2015	Local gastronomy
2017	Cultural tourism

*Source: EDEN Themes. The principles of EDEN.*

The topics proposed by the European Commission are much diversified. This allows each country to make the most of its tourist potential. Emphasis is placed on various types of specialized tourism, which satisfy the more individually expressed interests of the tourists.

In 2011, the European Commission launched a second type of EDEN call for proposals, which is a continuation of the "European Destinations of Excellence" initiative launched in 2006. The new proposals focus on awareness-raising campaigns of EDEN destinations, already selected by the first type of invitations (winners and runners-up of previous editions). The overall objective of the EDEN initiative is to draw attention to the value and diversity of European tourist destinations and to promote destinations where the objective of economic growth is pursued in such a way as to ensure social, cultural and environmental sustainability of tourism.

Bulgaria has held four national competitions for an excellent tourist destination:

- ❖ 2008 - "The Thracian spirit" on the theme of "Tourism and cultural heritage"
- ❖ 2009 - "952: Nature welcomes you!" on the theme of "Tourism and Protected Areas"
- ❖ 2010 - "Water - a source of life and prosperity" on the theme "Aqua Tourism"
- ❖ 2017 - "Cultural and Tourist EDEN Destinations in Bulgaria" on the theme of "Cultural Tourism"

As a result, in Bulgaria there are 17 EDEN destinations: Belogradchik, Lukovit, Vratsa, Silistra, Kavarna, Strandja NP, Kardzhali, Kazanlak, Belitsa, Sandanski, Sapareva Banya, Kyustendil, Yambol, Mezdra, Dragoman, Chavdar and Ardino. The EDEN destinations from Bulgaria include 19 municipalities, 1 district, cultural, historical and educational institutions, nature parks and others (Table 2)

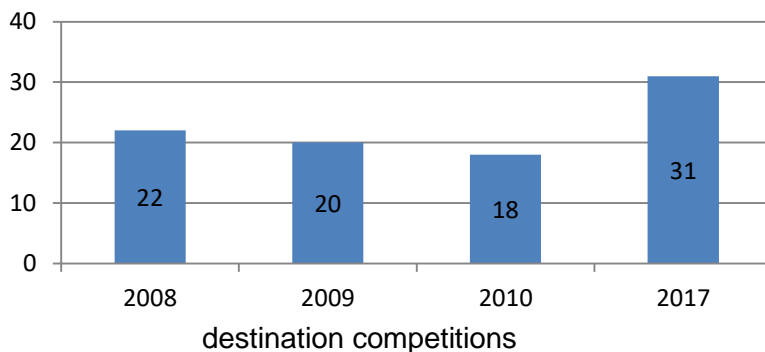
**Table 2.** EDEN destinations in Bulgaria

Themes:	2017 "Cultural and Tourist EDEN Destinations in Bulgaria" (Cultural Tourism)	2010 "Water - a source of life and prosperity" (Aqua Tourism)	2009 "952: Nature welcomes you!" (Protected Areas)	2008 The "Thracian spirit" (Cultural Heritage)
Destinations and projects:	<b>Yambol</b>	<b>Silistra</b> "Seven states of water: spirit, health, faith, history, beauty, tradition and customs"	<b>Belitsa</b> "The Natural Phenomenon in Rila National Park"	<b>Belogradchik</b> Folklore Feasts "from Timok to Iskar - in the footsteps of the Thracians"
	<b>Mezdra</b>	<b>Lukovit</b> "Panaca magic: water ... rock"	<b>Sapareva banya</b> "Waterfalls of Rila - a source of health and beauty"	<b>Silistra</b> "The Eternal Living Spirit of Thracian God Zalmoxis"
	<b>Dragoman</b>	<b>Sandanski</b> "Land-kissed by God"	<b>Kavarna</b> "Yailata Preserved Nature and Rich Heritage"	<b>Kazanlak</b> "Kazanlak - festival of the Thracian spirit in the valley of the Thracian kings"
	<b>Chavdar</b>	<b>Kyustendil</b> "The Life Water of Pautalia - Velbuzhd - Kyustendil"	<b>Vratsa</b> "The Gate to the Preserved Nature - Vratsa and the Valley of the Leva River"	<b>Kardzhali</b> "Dazdovnitsa - Crossroad of Cults"

The awarded EDED destinations have unique natural and cultural heritage. They all have enormous potential for developing alternative types of tourism and the opportunity to become popular to the tourists thanks to EDEN projects.

In the first edition of EDEN destinations on the topic "Thracian spirit" 22 organizations, companies and associations from all over the country took part. The following year the topic was "952: Nature welcomes you!" and the number of participants was 20. In 2010 the theme of the competition is "Water - a source of life and prosperity", and 18 municipalities and non-governmental organizations participated in it. In 2017 the total number of applications grew to 31. Applications for participating in the competition were from the municipalities Ardino, Sapareva Banya, Mezdra, Belene, Lovech, Brezovo, Samokov, Stara Zagora, Bourgas (2 offers), Dragoman, Petrich, Dryanovo, Radnevo, Devnya, Kostenets, Chavdar, Maritsa, Haskovo, Mogili, Kardzhali, Yambol, Elena, Botevgrad, Varna, Sliven, Malko Tarnovo, Bansko, Smolyan and the regional administrations Lovech and Dobrich. This shows that interest in EDEN destinations has increased significantly in 2017 (Figure 3).

**Figure 3.** Number of application forms for EDEN



## RESEARCH METHODOLOGY

The statistical methods used in the present study are a graphic method, descriptive analysis and nonparametric methods for the analysis of dependencies, incl. Fisher's Exact test and Kruskal-Wallis test. The data is measured by weak measurement scales - nominal, ordinal and dichotomous. This necessitates the search for and use of analytical methods that do not require, do not necessarily imply a normal distribution of the units of the aggregate by the meanings of the respective signs. To assess the impact of advertising on the chance of visiting tourist destinations, we used Logistic regression.

The level of significance  $\alpha = 0.05$  is used throughout the study where necessary. In order to establish the awareness of the EDEN projects and the impact of the advertising campaigns which aim is to promote the EDEN destinations among the tourists, a survey was conducted with two separate groups of participants.

With the first group of respondents, the survey was conducted in Bulgarian, with tourists answering 20 structured questions.

With the second group of respondents, the survey was conducted in English, with tourists also responding to 20 questions. The surveyed foreign tourists are from Germany, Russia, Romania, Czech Republic, Finland, Denmark, France, Spain, Japan, Greece, Sweden, Poland, Vietnam, Israel, Slovenia, Turkey and the United States.

The surveys were designed by the authors personally. In total 42 persons were being interviewed by the first group and 36 by the second group. The two surveys were conducted anonymously via publications on the Internet, in the period 03.02.2018-10.03.2018.

Link to the survey in English:

<https://www.surveymonkey.com/r/HG9XHHD>

Link to the survey in Bulgarian:

<https://www.surveymonkey.com/r/H3FQBRY>

Structurally, the surveys may be provisionally divided into four parts. The first part includes questions about the gender, age and nationality of the respondents. The second part examines EDEN awareness and visits to EDEN destinations. The third part evaluates the EDEN destinations by different criteria. The last part represents personal opinions and recommendations of tourists on the development of tourism in the EDEN destinations.

The surveys include both open-ended questions and closed-ended questions. It has questions that measure knowledge: familiarity with the EDEN initiative and EDEN destinations, questions that analyze EDEN destinations and a question that measures proposals on developing the EDEN destinations.

The questions are covering different research topics as:

- Awareness of the EDEN among respondents;
- Visits to the EDEN destinations by the respondents;

Personal opinion and image of the EDEN destinations among the respondents.

## **RESULTS AND DISCUSSION**

The results of the study are presented in tabular and graphical form in order to simplify systematization of the received information for a better visualization.

The number of men participating in the survey is predominant (Table 3).

**Table 3.** Number of respondents by gender

<b>Gender</b>	<b>Bulgarian</b>	<b>Foreigner</b>
<b>Man</b>	23	21
<b>Woman</b>	19	15

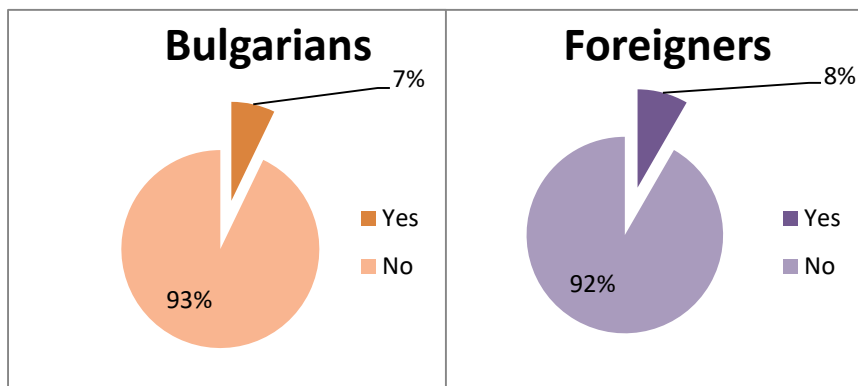
The age distribution of survey respondents is shown in the table below. The percentage of respondents between 18-28 years is the highest (Table 4).

**Table 4.** Number of respondents by age

Age	Bulgarian	Foreigner
10-17 years	2	0
18-28 years	28	21
29-39 years	8	10
40-49 years	3	2
Over 50 years	1	3

On the question "are you familiar with the EDEN project?" Only 7% of the Bulgarians and 8% of the foreigners have answered yes. (Figure 4)

**Figure 4.** Awareness of tourists about EDEN



Two of the surveyed Bulgarian citizens received information about the EDEN destinations via the Internet (publication on the official site of the Municipality of Vratsa), and one in the seminar "Management of a Tourist Destination" (discipline from the

curriculum of the specialty "International Tourism Business in Varna University of Economics). Of the surveyed foreign citizens, three are also familiar with the EDEN project. The first one received information about the project from visiting representatives of the Czech Tourism Organization at the University of Economics in Prague, Czech Republic, the second from the lecture course at the Tourist faculty of the University of Portoroz, Slovenia, and the third due to the professional realization - lecturer at the Faculty of Tourism at the Saint Petersburg State University of Economics, Russia.

For the total of 42 Bulgarians and 36 foreigners surveyed, it was found that the percentage of people who know EDEN destinations in Bulgaria is extremely low. We checked whether there is a significant difference in the relative share of individuals in both sets using the Fisher's Exact test.

We made the statement (hypothesis):

To test the null hypothesis (H<sub>0</sub>) that there is no difference between the two population proportions. H<sub>0</sub>:  $\pi_1 = \pi_2$

Alternative hypothesis (H<sub>1</sub>) - against the alternative that the two population proportions are not the same. H<sub>1</sub>:  $\pi_1 \neq \pi_2$

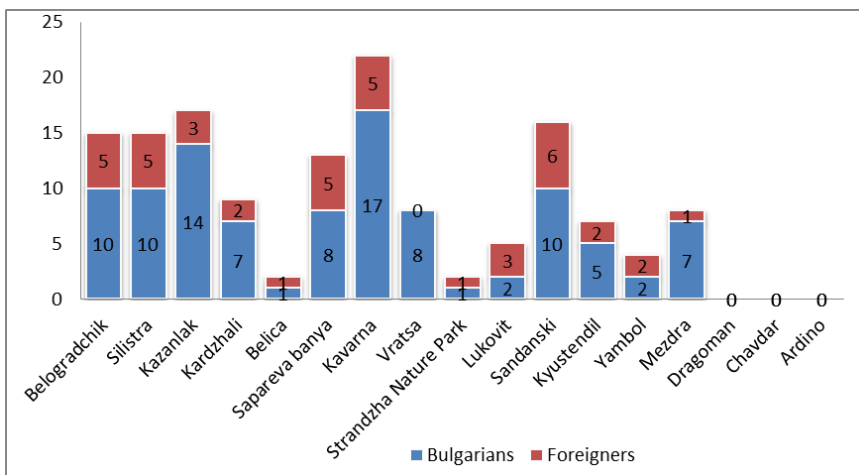
The calculations are made from a 2 x 2 contingency table. A null hypothesis is assumed, provided that  $\chi^2_{STAT} < \chi^2_{\alpha,df}$ , where  $\chi^2_{STAT}$  is the value of the empirical implementation of the test,  $\chi^2_{\alpha,df}$  - the critical values of  $\chi^2$  - distribution at the selected level of significance and degrees of freedom  $df = 1$ .

As a result of the calculations, we confirmed the initial assumption that EDEN destinations in Bulgaria are equally unknown for both Bulgarians and foreigners, there is no significant difference in the relative share of Bulgarians and foreigners who know EDEN destinations.

$$\chi^2_{STAT} = 0,0058 < \chi^2_{0,05,df=1} = 3,842$$

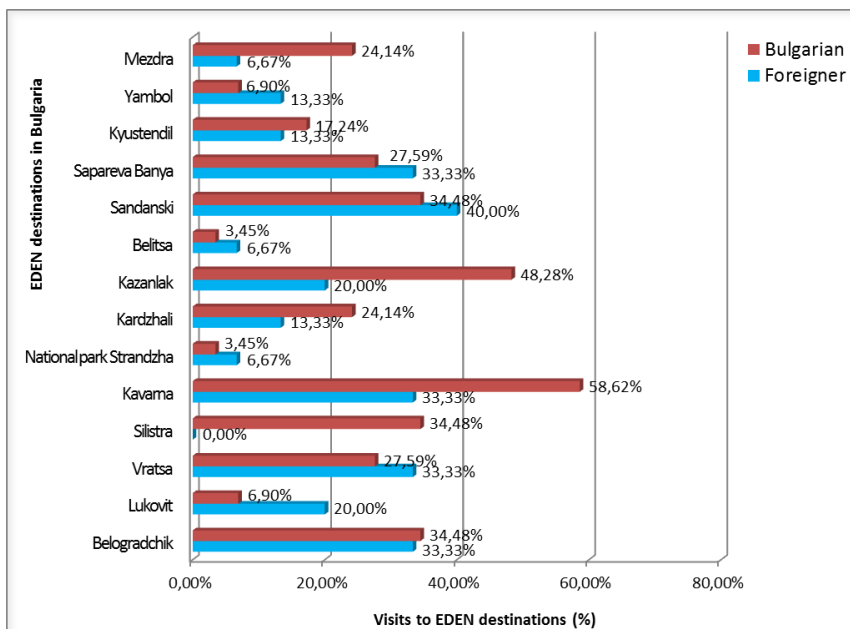
The following diagram (Figure 5) shows how visited by tourists are the EDEN destinations in Bulgaria. The blue part of each column shows the number of visits of Bulgarian tourists for each destination and the red part of each column shows the number of visits of foreign tourists for each destination.

**Figure 5.** Visits to EDEN destinations in Bulgaria



The diagram (Figure 5.1.) shows how visited by tourists are the EDEN destinations in Bulgaria in percent. The red part of each column shows the percent of visits of Bulgarian tourists for each destination and the blue part of each column shows the percent of visits of foreign tourists for each destination

**Figure 5.1.** Visits to EDEN destinations in Bulgaria in %



According to the survey, the most visited EDEN destinations are Kavarna, Kazanlak, Sandanski, Belogradchik, Silistra and Sapareva Banya. The leader among foreign tourists is Sandanski. An interesting result of the survey shows that the municipalities of Dragoman, Chavdar and Ardino, which are EDEN destinations from 2017, are not visited by any Bulgarian or foreign tourist.

As main reasons for visiting the destinations, tourists have indicated a trip with friends and family for recreation and visits to certain tourist sites. Visits to Belogradchik are related to the famous Belogradchik Rocks and Belogradchik Fortress. Silistra attracts tourists with the "Srebarna" reserve and the Danube River. As reasons to visit Kazanlak tourists have marked the Thracian tomb, the Rose Museum, the Rose Festival, the Chudomir Feasts and the Hobby Radio Expo. Kardzhali is famous among tourists due to the Kardjali Dam, the Stone Wedding, the Monyak Fortress, the Devil's Bridge

and Perperikon. Sapareva Banya attracts tourists with its Seven Rila Lakes, open geyser and warm mineral baths. Kavarna is visited because of the beach, rock concerts, cape Kaliakra and Mussel Festival. The main reasons for visiting Vratsa include the Ledenika cave, Botev's feat celebrations, the Skaklya waterfall and the Vratsa Balkan. Kyustendil attracts tourists thanks to the fortress of Hissarluka, the church "St. George" and the gallery of Vladimir Dimitrov - The Master. Sandanski is visited because of the archeological museum in the town, the nice climate and the place called "Rupite". Lukovit was visited due to a volleyball event. The reasons for visiting Mezdra are the Kaletto fortress and the near presence of the main railway station.

Most visited destinations, which are not part of EDEN, among the surveyed foreign tourists are Sofia, Burgas, Varna, Sunny Beach, Golden Sands, Balchik, Nessebar, Bansko, Borovets. Other destinations mentioned are Albena, Obzor, St. Constantine and Helena, Sozopol, Kamchia, Veliko Tarnovo, Plovdiv, Vidin, Rousse, Ivanovo, Stara Zagora, Shumen, Lovech, Asenovgrad, Bachkovo, Petrich, Blagoevgrad, Samokov, Chiprovtsi, Koprivshtitsa, Tryavna, Gabrovo, Montana and others. The most visited destinations are famous resorts on the Bulgarian Black Sea coast and winter resorts. However, other destinations are mentioned, which correspond to the more individualized interests of tourists, mainly related to cultural, rural and ecotourism.

According to the survey, among the EDEN destinations in other countries, the most visited are Saimaa (2010, Finland), Hiiumaa (2015, Estonia), Idrija (2011, Slovenia), Brda (2015, Slovenia), WaterReijk Weerribben Wieden Stykkishólmur (2011, Iceland), Jurmala (2010, Latvia), Gharb (2011, Malta), Gaziantep (2015, Turkey), Gornje Medimurje (2015, Croatia), Lipno (2013, Czech Republic) Ath (2008, Belgium) and Alba Iulia (2011, Romania).

As a conclusion, we can summarize that, despite the reported visits to different EDEN destinations in Bulgaria and abroad, the majority of tourists are not familiar with the EDEN destination project.

The survey conducted also gives an opportunity to assess the ecological status of EDEN destinations in Bulgaria. They are rated by the Bulgarian tourists with a score of 1 (Poor) to 4 (Excellent) depending on the level of satisfaction. Taking the scores from 1 to 4

of all respondents, an average score was calculated for each destination using the following formula:

$$D_x = S_x / R$$

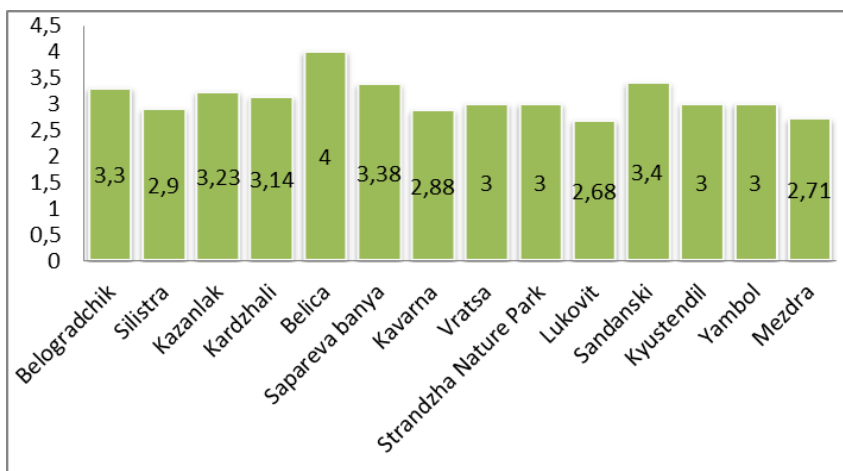
$D_x$  = Average score of destination<sub>x</sub>

$S_x$  = Sum of the scores of each respondent for destination<sub>x</sub>

$R$  = Number of all respondents

The following diagram shows the average assessment of the ecological status of the destinations. The lowest is the assessment of Silistra, Kavarna, Lukovit and Mezdra. However, their result is higher than the average.

**Figure 6.** Evaluation of the ecological status of EDEN destinations in Bulgaria

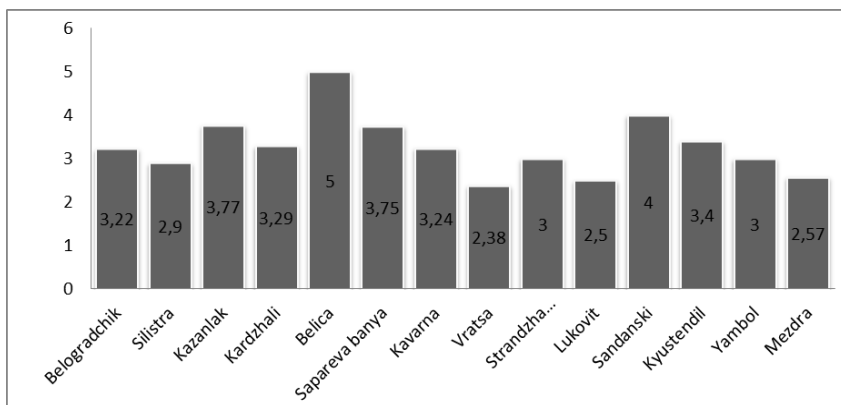


The highest % of respondents rated score of 3, which means the ecological status is satisfactory. The responses to this issue outline a positive overall assessment of the environmental status of the destinations.

With the help of the survey, the Bulgarian tourists also assess the infrastructure and superstructure in the EDEN destinations. The rating is between 1 (Low) and 5 (Excellent). Taking the scores from 1 to 5 for all respondents, again an average score was calculated for

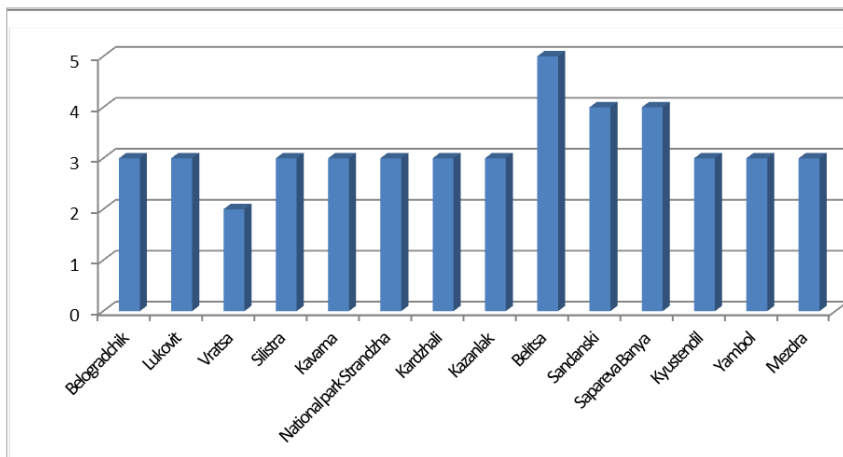
each destination using the formula:  $D_x = S_x / R$ . Figure 7 shows the average tourists' assessment of the infrastructure and superstructure of the tourist destinations.

**Figure 7.** Evaluation of the Infrastructure and Superstructure of EDEN Destinations in Bulgaria



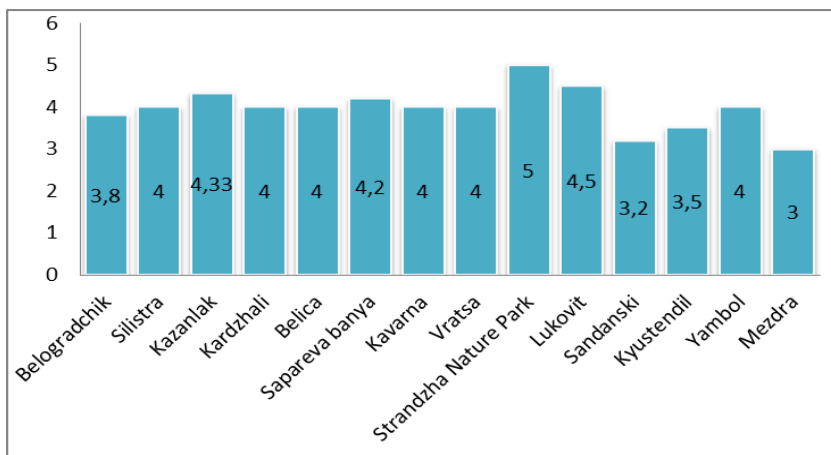
The lowest ratings are received by Silistra, Vratsa, Lukovi and Mezdra. The value below the average is that of Vratsa. The largest percentage of respondents rated 2 (Poor) and 3 (Average). The results of Kazanlak are positive - 53.85% of the respondents give a score of 4 (Very good), Sapareva Banya - 37.50% of the respondents give a score of 4, Sandanski - 40% of the respondents give a score of 5 and Belitsa, which receives an assessment 5. The conclusion is that the current level of infrastructure and superstructure in most destinations is not well perceived by the tourists.

**Figure 7.1.** Evaluation of the Infrastructure and Superstructure – Median used



The ratings of foreign visitors for EDEN destinations in Bulgaria range from 1 (Very Poor) to 5 (Excellent) depending on their satisfaction after their visit. The highest scores are received by Strandzha Nature Park, Lukovit, Kazanlak and Sapareva Banya, while the lowest is Mezdra. The predominant destination rating is 4 (Very Good) (Figure 8).

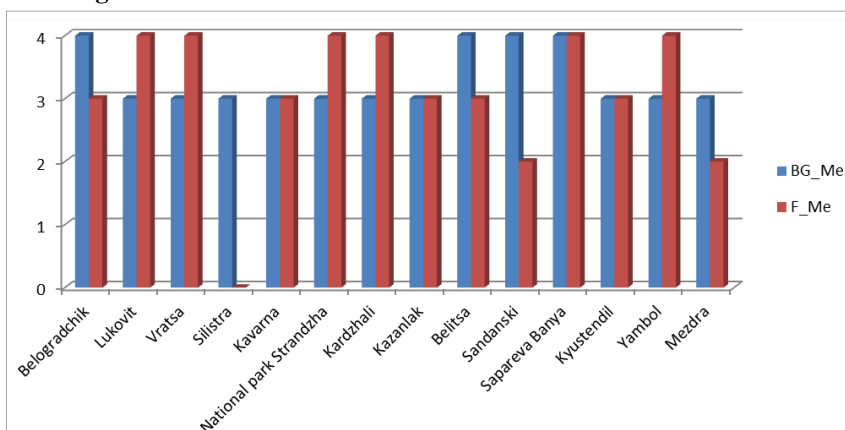
**Figure 8.** Evaluation of foreign tourists for EDEN destinations in Bulgaria



Assessments on this question show a relatively high level of satisfaction among foreign tourists visiting EDEN destinations.

Overall, the results show that the assessments of the EDEN destinations given by the two groups of respondents do not differ significantly (Figure 8.1.).

**Figure 8.1.** Evaluation of the EDEN destinations – Median used



Further, we used the Kruskal-Wallis test. This test is a type of non-parametric test, which means it does not impose as a condition a normal distribution of the sample on the sample. It is the so called nonparametric ANOVA method.

The zero hypothesis here consists of the assumption of the equality of the medians in two or more compared groups. We used the test to verify that there is a difference in the median values of the assessments regarding the ecological status of the EDEN destinations in Bulgaria. The test was carried out by first comparing the estimates of Bulgarians and foreigners.

Formally register the null hypothesis is:  $H_0: Me_1 = Me_2 = \dots = Me_j$

The alternative hypothesis is the assumption that at least one of the median values in the different groups is different:  $H_0: Me_1 \neq Me_2 \neq \dots \neq Me_j$ . The test has Chi-square distribution with (j-1) degrees of freedom. The null hypothesis can not be rejected provided that  $\chi_{STAT}^2 < \chi_{\alpha,df}^2$ . The verification here also occurs at a level of significance  $\alpha = 0,05$ .

The results of the test showed that between the responses of Bulgarians and foreigners regarding the ecological status of the destinations differ significantly.

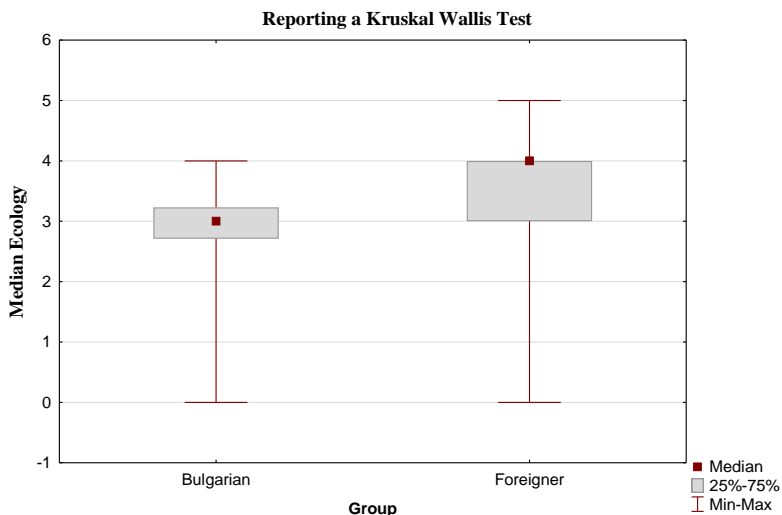
$$\chi_{STAT}^2 = 5,0124 > \chi_{0,05,df=1}^2 = 3,842$$

**Table 5.** Calculation of the ecological status

Data	Q6_ecology	
Factor codes	Group_BG_Foreig	
Sample size	34	
Test statistic	5.0124	
Corrected for ties Ht	5.0988	
Degrees of Freedom (DF)	1	
Significance level	P = 0.023942	
Factor	n	Average Rank
(1) BG	17	13.68
(2) F	17	21.32

As a conclusion, foreigners who visited the Bulgarian EDEN destinations rated the ecological status higher than the Bulgarians (Figure.9).

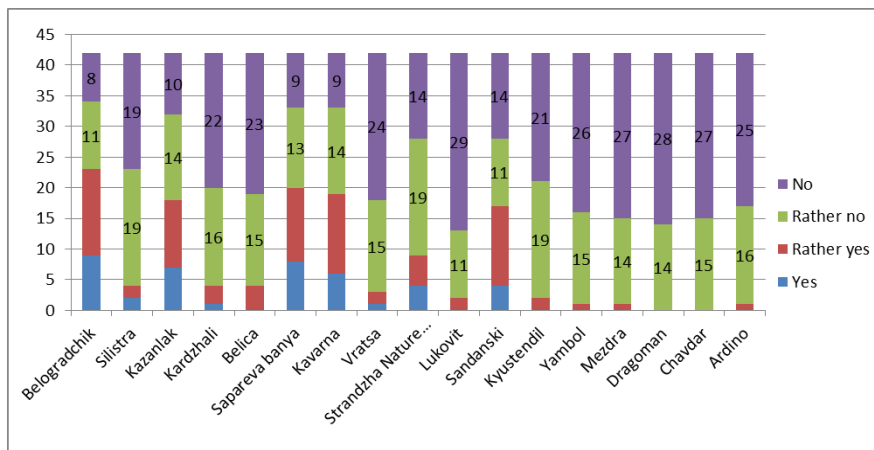
**Figure 9.** Kruskal Wallis test report



In all other indicators we have not established a significant difference in the estimates, including estimates of destination by destination.

Another point of our research relates to the opinion of tourists about the level of advertising of EDEN destinations (Figure 10).

**Figure 10.** Evaluation of the tourists for the level of advertising of EDEN destinations



Sapareva Banya, Kavarna, Kazanlak and Sandanski. For the least advertised destinations, tourists mention Dragoman and Chavdar, followed by Yambol, Mezdra and Ardino, which were not yet part of a communication campaign for promotion. Overall, the view of tourists, which assesses that destinations are not sufficiently advertised prevails.

### Impact of the advertising on visits

We assessed how the impact of advertising activities aimed at each of the EDEN destination affects the attendance of sites. The possibilities of Logistic regression were used to evaluate this impact. We divided the Bulgarian EDEN destinations into two groups - visited and non-visited destinations. The values we assigned to the dependent variable are as follows:  $Y = 1$  - visited objects;  $Y = 0$  - non-visited destinations. In the quality of an independent variable we used the recognition (presence), resp. the absence of advertising for the relevant sites. We conducted logistic regression separately for the two groups of respondents - Bulgarians and foreigners. In the study we used the following presentation of Logistic regression

$$\left(\frac{\pi}{1 - \pi}\right) = e^{(\beta_0 + \beta_1 x_1 + \beta_2 x_2 + \dots + \beta_j x_j)}$$

In this way of presenting Logistic regression the exponential values of the  $\exp^{(\beta_j)}$  parameters measure the private relative change of the dependent variable in the model. The  $e^{\beta_j}$  variables measure how

many times the probability  $\left( \frac{\pi}{1-\pi} \right)$  of occurrence of the resultant phenomenon Y will change for the unit of variation of the corresponding j-factor in the model. Dimensions  $(e^{\beta_j} - 1) \cdot 100\%$  indicate how many percent will change the chance of Y - visiting tourists on the relevant destinations when there is an advertising for them. The availability of a destination advertising is also a dichotomous scaled variable. For evaluation, we used additional coding, using as basis the answers "NO" to the respondents.

Logistic regression results are as follows:

**Table 6.** Results of the Logistic regression

Variable	B	S.E.	Wald	df	Sig.	Exp(B)	95% C.I. for EXP(B)	
							Lower	Upper
<b><i>Bulgarians</i></b>								
Advertising (1)	2,485	1,443	2,964	1	0,085	12,000	0,709	203,135
Constant	- 0,693	1,224	0,571					
<b><i>Foreigners</i></b>								
Variable	B	S.E.	Wald	df	Sig.	Exp(B)	95% C.I. for EXP(B)	
							Lower	Upper
Advertising (1)	1,569	0,288	5,451	1	0,019	4,800	0,385	59,895
Constant	0,511	0,730	0,489	1	0,484	1,667		

The calculations show that the presence of advertising activity for certain destinations increases the chance of visiting sites multiple times.

For the Bulgarian population this increase is 12 times, while for foreigners it is almost 5 times. Estimated parameters of the equations are statistically significant and valid in terms of statistical theory.

The last question is related to the tourist's recommendations for the development of tourism in the EDEN destinations. The most important recommendations are:

Improving the advertising of the EDEN project itself and EDEN destinations;

- ✓ Improving the infrastructure and superstructure in the EDEN destinations;
- ✓ Preservation and maintenance of the environment;
- ✓ Creating groups on social networks with constant and up-to-date information on tourist sites and cultural events;
- ✓ Organizing cultural events to better advertise little-known landmarks;
- ✓ Innovative way of presenting sights;
- ✓ More information signs;
- ✓ Investing for successful preservation and restoration of Bulgarian landmarks;
- ✓ Building artificial landmarks - a practice that is being applied in other countries, with great success, for example, in Cyprus;
- ✓ Increasing the qualification of the tourist staff and improving the service.

On the basis of the analysis, the following three main conclusions can be drawn:

- Interest in EDEN projects is increasing;
- EDEN projects contribute to the development of tourism and the increase in the number of tourists in EDEN destinations in Bulgaria;
- The awareness of the tourists about the project and the destinations is still very small.

After summarizing the results of the survey, it is imperative to note the absolute opinion among the respondents about the improvement of advertising activities for the promotion of EDEN destinations. More than 90% of the respondents said the improvement of advertising to promote destinations was recommended.

In the opinion of the authors, Bulgaria should continue the activities on the promotion of EDEN destinations. Their realization significantly contributes to their direct promotion as well as to the overall presentation of Bulgaria as a destination for specialized tourism, focusing tourists' attention on lesser known destinations and products mainly in cultural, spa and ecotourism.

Despite the good results, the marketing communication system can be improved and complemented by several activities:

- ✓ Not allowing mistakes of any kind

During the analysis, misprints and factual errors were found in various printed and on-line materials related to the promotion of EDEN destinations.

For example, on the official sites <http://edenbulgaria.eu/bg/node/21> and [https://ec.europa.eu/growth/tools-](https://ec.europa.eu/growth/tools-databases/eden/destinations/bulgaria_en#belitsa)

[databases/eden/destinations/bulgaria\\_en#belitsa](https://ec.europa.eu/growth/tools-databases/eden/destinations/bulgaria_en#belitsa) the Semkovo mountain resort is declared at a height of 600 meters above sea level, and in EDEN Catalog "Journey Through Bulgaria", p. 22 the resort rises at an altitude of 1550-1600 m above sea level. An extremely important mistake is made in the news broadcast on Vratsa, where the municipality of Sliven was declared a winner destination for the project "Cultural and Tourist EDEN Destinations in Bulgaria" in 2017 instead of Yambol Municipality. To prevent mistakes of any kind, we recommend re-checking the information and materials for publication and printing.

- ✓ Television advertising

The proposal includes the production of additional advertising videos and a general movie about the EDEN destinations to be broadcast on TV. The information that can be presented to the viewers can be about the EDEN project itself, the tourist attractions and the different events taking place in the EDEN destinations, urban legends and stories from local residents, stories from tourists about their impressions and experiences in destinations and more.

- ✓ Internet advertising

The proposal includes mostly social media advertising - Facebook, Youtube, Twitter, Instagram, LinkedIn, VKontakte. The ad consists of sharing photos, links, videos, professional information, etc. about the EDEN destinations on specially designed pages.

- ✓ Out-of-home advertising

The proposal includes transport advertising and billboards. Destination transport advertising consists of advertising on buses, cars, stops and stations. Both types of advertising are based on creatively created ad images related to EDEN destinations.

✓ Organizing events

The proposal includes the organization of sport events, cultural events, festivals, exhibitions and more at the EDEN destinations to attract the attention of the public and journalists and be reflected in the media.

✓ Organization of photo competition of EDEN destinations

The proposal includes organizing a competition for the best photo showing the most exciting and entertaining moments of the tourists during their holiday in one of the EDEN destinations in Bulgaria. The goal is to promote the opportunities and attractions of the destinations by publishing all the received photos on specially created social networking webpages. For the best photo can be a prize: free weekend for two in a country house, hut or hotel in a EDEN destination. The top photos at the competition can be used to make a calendar that can be purchased by anyone willing to acquire it and / or to be printed and to organize an exhibition to attract the attention of tourists and the media.

✓ Conducting lectures in schools and universities

The proposal is related to conducting lectures on tourism sustainability topics and the EDEN initiative for students who are studying Tourism. The proposal can be complemented by organizing excursions to EDEN destinations, where students will have the opportunity to learn about the opportunities for tourism in the destinations in an interesting way.

✓ Issue a book about the EDEN destinations in Bulgaria

In the recent years, various travel guides such as "50 places to visit in Bulgaria in 2015", "50 places to visit in Bulgaria in 2016", "101 byways", "New 101 byways" and "101 byways for advanced " are gaining great popularity. Their idea is to travel to little known places in Bulgaria. Many sites in the EDEN destinations are included and described in these books - Prohodna Cave (Lukovit), Meanders of Arda River and Devil's Bridge (Ardino), Topolnitsa Archeological Park (Chavdar), Perperikon, Stone Mushrooms, Stone Wedding, The

Womb Cave (Kardzhali), Pautalia Fortress (Kyustendil), Rock phenomenon Ritlite (Mezdra) and others.

The proposal includes the publication of a book as a travel guide to the EDEN destinations that includes information on the EDEN initiative and projects that have won the EDEN Award, information on the sights and events taking place in the destinations and information on the accessibility of destinations. The book should be published in two versions - in English and in Bulgarian.

✓ Mobile application

The proposal includes creating a special mobile application related to the EDEN destinations. It should include up-to-date information about tourist sites, attractions and events in the destinations, accommodation and transport, and especially in and around the destinations. An interesting addition to the application will be interactive outdoor quiz games related to the discovery of mysteries about the destinations. The app should be available to all Android smartphones and require access to the location of the tourists. In order to solve the puzzles, there will be a certain places marked on a special online card. When a spot is reached, a question will be shown. Each puzzle will contain a number of questions, and answering all the questions will help solve the mystery. For the successful solving of each mystery a prize reward will be provided, related to the theme of the mystery.

✓ Making souvenir coins

The proposal includes the production of special EDEN coins. A typical symbol for each EDEN destination shall be chosen for the obverse of the coins. The reverse of the coins should be common to all the destinations and present the EDEN logo. Coins can be used both for the quiz game in the mobile application and for souvenirs. A special coin album can also be made in addition to them.

## **CONCLUSION**

The main effect of the project implementation in Bulgaria is the achievement of permanent recognition and confirmation of the image of the EDEN destinations in the country as an alternative, non-traditional and ecologically appropriate form of tourism.

In the present study, there were made: an analysis of the essence and characteristics of the sustainable development of tourism and EDEN destinations, an analysis of the EDEN destinations in Bulgaria and an analysis of the opportunities and directions for popularization and development of the EDEN destinations in Bulgaria.

The results of the complete analysis show:

- Efforts are being made to promote the sustainable development of tourism in a global perspective;
- EDEN destinations are striving to promote sustainable tourism in Europe;
- EDEN projects in Bulgaria contribute to the development of tourism and the increase in the number of tourists in the EDEN destinations;
- The interest in the EDEN projects in Bulgaria is increasing, but tourists' awareness of the project and the destinations is still very small.

Competitiveness of the world, including the Bulgarian tourism industry is closely related to its sustainability as the quality of tourist destinations is strongly influenced by the respective natural and cultural environment and their integration into the local community. In the long term, sustainability and economic growth can only be achieved by balancing economic, socio-cultural and environmental factors.

Raising awareness of the EDEN projects and promoting the EDEN destinations would contribute to adopting the model of sustainable tourism development and the development of alternative forms of tourism. This in turn would help to overcome the territorial and seasonal concentration of tourism flows and reduce the negative effects of uncontrolled tourism development.

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# **TOURISMOS**

*An International Multidisciplinary Journal of Tourism*

## **AIMS & SCOPE**

TOURISMOS is an international, multi-disciplinary, refereed (peerreviewed) journal aiming to promote and enhance research in all fields of tourism, including travel, hospitality and leisure. The journal is published by the University of the Aegean (in Greece), and is intended for readers in the scholarly community who deal with different tourism sectors, both at macro and at micro level, as well as professionals in the industry. TOURISMOS provides a platform for debate and dissemination of research findings, new research areas and techniques, conceptual developments, and articles with practical application to any tourism segment. Besides research papers, the journal welcomes book reviews, conference reports, case studies, research notes and commentaries.

TOURISMOS aims at:

- Disseminating and promoting research, good practice and innovation in all aspects of tourism to its prime audience including educators, researchers, post-graduate students, policy makers, and industry practitioners.
- Encouraging international scientific cooperation and understanding, and enhancing multi-disciplinary research across all tourism sectors.

The scope of the journal is international and all papers submitted are subject to strict blind peer review by its Editorial Board and by other anonymous international reviewers. The journal features conceptual and empirical papers, and editorial policy is to invite the submission of manuscripts from academics, researchers, post-graduate students, policymakers and industry practitioners. The Editorial Board will be looking particularly for articles about new trends and developments

within different sectors of tourism, and the application of new ideas and developments that are likely to affect tourism, travel, hospitality and leisure in the future. TOURISMOS also welcomes submission of manuscripts in areas that may not be directly tourism-related but cover a 236 topic that is of interest to researchers, educators, policy-makers and practitioners in various fields of tourism.

The material published in TOURISMOS covers all scientific, conceptual and applied disciplines related to tourism, travel, hospitality and leisure, including: economics, management, planning and development, marketing, human resources, sociology, psychology, geography, information and communication technologies, transportation, service quality, finance, food and beverage, and education. Manuscripts published in TOURISMOS should not have been published previously in any copyright form (print or electronic/online). The general criteria for the acceptance of articles are:

- Contribution to the promotion of scientific knowledge in the greater multi-disciplinary field of tourism.
- Adequate and relevant literature review.
- Scientifically valid and reliable methodology.
- Clarity of writing.
- Acceptable quality of English language.

TOURISMOS is published twice per year (in Spring and in Autumn). Each issue includes the following sections: editorial, research papers, research notes, case studies, book reviews, conference reports, industry viewpoints, and forthcoming events.

## **JOURNAL SECTIONS**

### **Editorial**

The Editorial addresses issues of contemporary interest and provides a detailed introduction and commentary to the articles in the current

issue. The editorial may be written by the Editor, or by any other member(s) of the Editorial Board. When appropriate, a “Guest Editorial” may be presented. However, TOURISMOS does not accept unsolicited editorials.

### **Research Papers**

For the Research Papers section, TOURISMOS invites full-length manuscripts (not longer than 6000 words and not shorter than 4000 words) from a variety of disciplines; these papers may be either empirical or conceptual, and will be subject to strict blind peer review (by at least three anonymous referees). The decision for the final acceptance of the paper will be taken unanimously by the Editor and by the Associate Editors. The manuscripts submitted should provide original and/or innovative ideas or approaches or findings that eventually push the frontiers of knowledge. Purely descriptive accounts are not considered suitable for this section. Each paper should have the following structure: a) abstract, b) introduction (including an overall presentation of the issue to be examined and the aims and objectives of the paper), c) main body (including, where appropriate, the review of literature, the development of hypotheses and/or models, research methodology, presentation of findings, and analysis and discussion), d) conclusions (including also, where appropriate, recommendations, practical implications, limitations, and suggestions for further research), e) bibliography, f) acknowledgements, and g) appendices.

### **Case Studies**

Case Studies should be not longer than 3500 words and not shorter than 2500; these articles should be focusing on the detailed and critical presentation/review of real-life cases from the greater tourism sector, and must include - where appropriate - relevant references and bibliography. Case Studies should aim at disseminating information and/or good practices, combined with critical analysis of real examples. Purely descriptive accounts may be considered suitable for

this section, provided that are well-justified and of interest to the readers of TOURISMOS. Each article should have the following structure: a) abstract, b) introduction (including an overall presentation of the case to be examined and the aims and objectives of the article), c) main body (including, where appropriate, the review of literature, the presentation of the case study, the critical review of the case and relevant discussion), d) conclusions (including also, where appropriate, recommendations, practical implications, and suggestions for further study), e) bibliography, f) acknowledgements, and g) appendices. All Case Studies are subject to blind peer review (by at least one anonymous referee). The decision for the final acceptance of the article will be taken unanimously by the Editor and by the Associate Editor.

### **Research Notes**

Research Notes should be not longer than 2000 words and not shorter than 1000; these papers may be either empirical or conceptual, and will be subject to blind peer review (by at least two anonymous referees). The decision for the final acceptance of the paper will be taken unanimously by the Editor and by the Associate Editors. The manuscripts submitted may present research-in-progress or my focus on the conceptual development of models and approaches that have not been proven yet through primary research. In all cases, the papers should provide original ideas, approaches or preliminary findings that are open to discussion. Purely descriptive accounts may be considered suitable for this section, provided that are well-justified and of interest to the readers of TOURISMOS. Each paper should have the following structure: a) abstract, b) introduction (including an overall presentation of the issue to be examined and the aims and objectives of the paper), c) main body (including, where appropriate, the review of literature, the development of hypotheses and/or models, research methodology, presentation of findings, and analysis and discussion), d) conclusions (including also, where appropriate, recommendations,

practical implications, limitations, and suggestions for further research), e) bibliography, f) acknowledgements, and g) appendices.

### **Book Reviews**

Book Reviews should be not longer than 1500 words and not shorter than 1000; these articles aim at presenting and critically reviewing books from the greater field of tourism. Most reviews should focus on new publications, but older books are also welcome for presentation. Book Reviews are not subject to blind peer review; the decision for the final acceptance of the article will be taken unanimously by the Editor and by the Book Reviews Editor. Where appropriate, these articles may include references and bibliography. Books to be reviewed may be assigned to potential authors by the Book Reviews Editor, though TOURISMOS is also open to unsolicited suggestions for book reviews from interested parties.

### **Conference Reports**

Conference Reports should be not longer than 2000 words and not shorter than 1000; these articles aim at presenting and critically reviewing conferences from the greater field of tourism. Most reports should focus on recent conferences (i.e., conferences that took place not before than three months from the date of manuscript submission), but older conferences are also welcome for presentation if appropriate. Conference Reports are not subject to blind peer review; the decision for the final acceptance of the article will be taken unanimously by the Editor and by the Conference Reports Editor. Where appropriate, these articles may include references and bibliography. Conference reports may be assigned to potential authors by the Conference Reports Editor, though 239 TOURISMOS is also open to unsolicited suggestions for reports from interested parties.

### **Industry Viewpoints**

Industry Viewpoints should be not longer than 1500 words and not shorter than 500; these articles may have a “commentary” form, and aim at presenting and discussing ideas, views and suggestions by practitioners (industry professionals, tourism planners, policy makers, other tourism stakeholders, etc.). Through these articles, TOURISMOS provides a platform for the exchange of ideas and for developing closer links between academics and practitioners. Most viewpoints should focus on contemporary issues, but other issues are also welcome for presentation if appropriate. Industry Viewpoints are not subject to blind peer review; the decision for the final acceptance of the article will be taken unanimously by the Editor and by the Associate Editors. These articles may be assigned to potential authors by the editor, though TOURISMOS is also open to unsolicited contributions from interested parties.

### **Forthcoming Events**

Forthcoming Events should be not longer than 500 words; these articles may have the form of a “call of papers”, related to a forthcoming conference or a special issue of a journal. Alternatively, forthcoming events may have the form of a press release informing readers of TOURISMOS about an event (conference or other) related to the tourism, travel, hospitality or leisure sectors. These articles should not aim at promoting sales of any products or services. The decision for the final acceptance of the article will be taken by the Editor.

# TOURISMOS

*An International Multidisciplinary Journal of Tourism*

## NOTES FOR CONTRIBUTORS

### Manuscript Submission Procedure

Manuscripts should be written as understandably and concisely as possible with clarity and meaningfulness. Submission of a manuscript to TOURISMOS represents a certification on the part of the author(s) that it is an original work and has not been copyrighted elsewhere; manuscripts that are eventually published may not be reproduced in any other publication (print or electronic), as their copyright has been transferred to TOURISMOS. Submissions are accepted only in electronic form; authors are requested to submit one copy of each manuscript by email attachment. All manuscripts should be emailed to the Editor-in-Chief (Prof. Paris Tsartas, at [ptsar@aegean.gr](mailto:ptsar@aegean.gr)) and to the Editors (Prof. Evangelos Christou, at [e.christou@tour.teithe.gr](mailto:e.christou@tour.teithe.gr) and Prof. Andreas Papatheodorou, at [a.papatheodorou@aegean.gr](mailto:a.papatheodorou@aegean.gr)), and depending on the nature of the manuscript submissions should also be emailed as follows:

- Conference reports should be emailed directly to the Conference Reports Editor (Dr. Vasiliki Galani-Moutafi), at [v.moutafi@sa.aegean.gr](mailto:v.moutafi@sa.aegean.gr).
- Book reviews should be emailed directly to the Book Reviews Editor (Prof. Marianna Sigala), at [marianna.sigala@unisa.edu.au](mailto:marianna.sigala@unisa.edu.au).
- Full papers and all other types of manuscripts should be emailed directly to the Editors (Prof. Evangelos Christou and Prof. Andreas Papatheodorou), at [e.christou@tour.teithe.gr](mailto:e.christou@tour.teithe.gr) and [a.papatheodorou@aegean.gr](mailto:a.papatheodorou@aegean.gr).

Feedback regarding the submission of a manuscript (including the reviewers' comments) will be provided to the author(s) within six weeks of the receipt of the manuscript. Submission of a manuscript will be held to imply that it contains original unpublished work not being considered for publication elsewhere at the same time. Each author of a manuscript accepted for publication will receive three complimentary copies of the issue, and will also have to sign a "transfer of copyright" form. If appropriate, author(s) can correct first proofs. Manuscripts submitted to TOURISMOS, accepted for publication or not, cannot be returned to the author(s).

### **Manuscript Length**

Research Papers should be not longer than 6000 words and not shorter than 4000. Research Notes should be not longer than 2000 words and not shorter than 1000. Case Studies should be not longer than 3500 words and not shorter than 2500. Book Reviews should be not longer than 1500 words and not shorter than 1000. Conference Reports should be not longer than 2000 words and not shorter than 1000. Industry Viewpoints should be not longer than 1500 words and not shorter than 500. Forthcoming Events should be not longer than 500 words. Manuscripts that do not fully conform to the above word limits (according to the type of the article) will be automatically rejected and should not be entered into the reviewing process.

### **Manuscript Style & Preparation**

- All submissions (research papers, research notes, case studies, book reviews, conference reports, industry viewpoints, and forthcoming events) must have a title of no more than 12 words.
- Manuscripts should be double-line spaced, and have at least 2,5 cm (one-inch) margin on all four sides. Pages should be numbered consecutively.

- The use of footnotes within the text is discouraged – use endnotes instead. Endnotes should be kept to a minimum, be used to provide additional comments and discussion, and should be numbered consecutively in the text and typed on a separate page at the end of the article.
- Quotations must be taken accurately from the original source. Alterations to the quotations must be noted. Quotation marks (“ ”) are to be used to denote direct quotes. Inverted commas (‘ ’) should denote a quote within a quotation. If the quotation is less than 3 lines, then it should be included in the main text enclosed in quotation marks. If the quotation is more than 3 lines, then it should be separated from the main text and indented.
- The name(s) of any sponsor(s) of the research contained in the manuscript, or any other acknowledgements, should appear at the very end of the manuscript.
- Tables, figures and illustrations are to be included in the text and to be numbered consecutively (in Arabic numbers). Each table, figure or illustration must have a title.
- The text should be organized under appropriate section headings, which, ideally, should not be more than 500-700 words apart. • The main body of the text should be written in Times New Roman letters, font size 12.
- Section headings should be written in Arial letters, font size 12, and should be marked as follows: primary headings should be centred and typed in bold capitals and underlined; secondary headings should be typed with italic bold capital letters; other headings should be typed in capital letters. Authors are urged to write as concisely as possible, but not at the expense of clarity.
- The preferred software for submission is Microsoft Word.
- Authors submitting papers for publication should specify which section of the journal they wish their paper to be considered for: research papers, research notes, case studies, book reviews,

conference reports, industry viewpoints, and forthcoming events.

- Author(s) are responsible for preparing manuscripts which are clearly written in acceptable, scholarly English, and which contain no errors of spelling, grammar, or punctuation. Neither the Editorial Board nor the Publisher is responsible for correcting errors of spelling or grammar.
- Where acronyms are used, their full expression should be given initially.
- Authors are asked to ensure that there are no libellous implications in their work.

### **Manuscript Presentation**

For submission, manuscripts of research papers, research notes and case studies should be arranged in the following order of presentation:

- First page: title, subtitle (if required), author's name and surname, affiliation, full postal address, telephone and fax numbers, and e-mail address. Respective names, affiliations and addresses of co-author(s) should be clearly indicated. Also, include an abstract of not more than 150 words and up to 6 keywords that identify article content. Also include a short biography of the author (about 50 words); in the case of co-author(s), the same details should also be included. All correspondence will be sent to the first named author, unless otherwise indicated.
- Second page: title, an abstract of not more than 150 words and up to 6 keywords that identify article content. Do not include the author(s) details, affiliation(s), and biographies in this page.
- Subsequent pages: the paper should begin on the third page and should not subsequently reveal the title or authors. In these pages should be included the main body of text (including

tables, figures and illustrations); list of references; appendixes; and endnotes (numbered consecutively).

- The author(s) should ensure that their names cannot be identified anywhere in the text.

## **Referencing Style**

In the text, references should be cited with parentheses using the “author, date” style - for example for single citations (Ford, 2004), or for multiple citations (Isaac, 1998; Jackson, 2003). Page numbers for specific points or direct quotations must be given (i.e., Ford, 2004: 312-313). The Reference list, placed at the end of the manuscript, must be typed in alphabetical order of authors. The specific format is:

- For journal papers: Tribe, J. (2002). The philosophic practitioner. *Annals of Tourism Research*, Vol.29, No.2, pp.338-357.
- For books and monographs: Teare, R. & Ingram, H. (1993). *Strategic Management: A Resource-Based Approach for the Hospitality and Tourism Industries*. London, Cassell.
- For chapters in edited books: Sigala, M. and Christou, E. (2002). Use of Internet for enhancing tourism and hospitality education: lessons from Europe. In K.W. Wober, A.J. Frew and M. Hitz (Eds.) *Information and Communication Technologies in Tourism*, Wien: Springer-Verlag.
- For papers presented in conferences: Ford, B. (2004). Adoption of innovations on hospitality. Paper presented at the 22nd EuroCHRIE Conference. Bilkent University, Ankara, Turkey: 3-7 November 2004.
- For unpublished works: Gregoriades, M. (2004). The impact of trust in brand loyalty, Unpublished PhD Tourismos. Chios, Greece: University of the Aegean.
- For Internet sources (if you know the author): Johns, D. (2003) The power of branding in tourism.

[Http://www.tourismabstracts.org/marketing/papers-authors/id3456](http://www.tourismabstracts.org/marketing/papers-authors/id3456). Accessed the 12th of January 2005, at 14:55. (note: always state clearly the full URL of your source).

- For Internet sources (if you do not know the author): Tourism supply and demand. [Http://www.tourismabstracts.org/marketing/papersauthors/id3456](http://www.tourismabstracts.org/marketing/papersauthors/id3456). Accessed the 30th of January 2004, at 12:35. (note: always state clearly the full URL of your source).
- For reports: Edelstein, L. G. & Benini, C. (1994). Meetings and Conventions. Meetings market report (August), 60-82.